REVISED REPORT
OF THE TRAVEL WORKING GROUP

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University Libraries
University of South Carolina

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Executive Summary

This document proposes recommendations for how spending on faculty travel may be funded and allocated; outlines the state of current University Libraries’ practices based on recent data; and summarizes the feedback collected from faculty with regard to travel funding.

It is clear that professional development travel is important to our faculty for tenure and promotion, for staying informed about current trends and innovations in the field, and for representing the Libraries on regional, national, and international levels.

There is some concern regarding the confusion and ambiguity of the current funding process, with an explicit desire for greater fairness and transparency. There is also explicit support for untenured and low-earning faculty to have access to avenues for additional funding, as well as a desire for a clearer process of knowledge transfer.

The group recommends that the Libraries adopt a funding model that provides an annual travel stipend to individual faculty members, with the possibility of extra available funds contingent on a clearly defined set of rules and circumstances.

The goal of these recommendations is to guarantee a committed budget for faculty travel, alleviate confusion and uncertainty in the application process, increase transparency, and encourage growth and knowledge transfer.

Recommendations

1. Provide a high level of support for faculty professional development travel and engagement.
2. Adopt a funding model that provides an annual stipend or budget.
3. Provide an additional stipend, or bonus budget, to untenured faculty members.
4. Provide an additional stipend, or budget, for participating faculty members.
5. Provide an incentive to librarians who choose to limit their travel funding requests in a particular year with a reward in the following fiscal year.
6. Require informal knowledge transfer within units; encourage more formal knowledge transfer throughout the Libraries.
7. Provide a discretionary fund for additional support, overseen by the Administration.
8. Set an ambitious target for growth.
9. Introduce procedures to increase transparency and decrease uncertainty.
10. Seek out ways to reduce the short-term financial burden posed by travel.

Major Changes in the Revised Version

The revised report is changed in four major ways:

First, whereas the original report recommended full funding for participating faculty, the revised report recommends a bonus for participating faculty. This change was made in response not only to concerns about the total budget, but also to concerns about the potential ambiguity of the phrase “full funding” and about fairness. See Recommendation 4.
Second, the revised report recommends the creation of a discretionary fund administered by the Dean or an approved delegate. Such a fund could provide full support in cases where requests exceed approved individual budgets. It could also alleviate issues associated with planning a full fiscal year in advance. See **Recommendation 7**.

Third, the revised report removes the recommendation to create an international travel lottery. The Committee believes that the cost and merit of the proposed trip, rather than the geographical location, should be the primary considerations in budgeting decisions.

Finally, fourth, whereas the original report suggested that it would *not* be necessary to form a permanent travel committee of the faculty, the revised report recommends the creation of just such a body by the end of academic year 2019-2020. See **A note on implementation and oversight**.

The sample forms provided in **Appendix 1** have also been updated to reflect these changes.

**Definitions**

*Professional development travel* is defined as activities that contribute to improving professional knowledge and skills. Professional development opportunities are self-initiated and would be considered elective by the administration.

*Participation* is defined as contributing to a professional development activity beyond attending, and may include any of the following:

- presenting a paper or poster
- participating in or moderating a panel or discussion
- fulfilling responsibilities as an officer or committee member for a professional organization

*Administrative travel* is non-elective on the part of the faculty member. Examples include, but are not limited to:

- work training
- collection pickups
- exhibitions
- speaking engagements on behalf of the library

*Stipend* is a fixed annual budget to cover approved expenses associated with professional development travel. All library faculty have access to the same base stipend per year. Untenured faculty have access to an additional stipend to help assist in professional development in advance to tenure.

*Expense* is a necessary cost incurred in order to successfully travel and/or participate for the purposes of professional development, including but not limited to air fare, mileage, hotel accommodations, and registration. All expenses must be approved and verified before reimbursement.
Goals

Our faculty desires a process that is fair and transparent. This process should be as simple as possible without unduly sacrificing fairness or transparency.

To that end, the working group sought to make recommendations that will:

- Ensure a high level of support for professional development for all faculty
- Increase transparency and ensure a sense of fairness
- Maintain a process that allows the administration to budget for the fiscal year while allowing individual faculty members to plan and budget according to their own goals and schedules
- Update the guidelines and application process to decrease uncertainty when planning
- Encourage savings where possible
- Encourage knowledge transfer to increase the institutional value of individual professional development
- Invest strategically in USC Libraries’ international profile
- Set an ambitious target for growth of the current travel budget to account for the increase in faculty appointments and advancement in professional engagement by the faculty as a whole

Recommendations

Recommendation 1: Provide a high level of support for faculty professional development travel and engagement.

Faculty professional development and engagement with the national field is imperative for the success of our Libraries. Academic libraries in research institutions have a responsibility to hire and maintain a library faculty with the best knowledge and skills available. Professional development travel is necessary for faculty to stay up to date with new practices in their respective fields or areas of responsibility.

Faculty professional development and engagement are also responsibilities that are shared between the Libraries and individuals. Both the Libraries and individuals commit time to professional development: The Libraries allow individuals to travel without dispensing annual leave; individuals give up an often significant share of their personal time.

Both the Libraries and individuals commit funds as well. Membership fees, as a matter of university policy, cannot be reimbursed. Low per diem rates virtually guarantee financial outlays by individuals. Finally, the system of reimbursement means that librarians must make a significant short-term expenditure. While several librarians who were interviewed expressed a willingness and ability to make a larger financial contribution toward their own professional development, for many even the short-term cost is a very real burden.

We must also weigh the critical role travel funding has played in recruitment and retention. Full funding for travel has historically provided a small but meaningful offset to depressed salaries for the large majority of our faculty.
Funding to support task-related skills or official university business is not a cost that should be shared by individuals. It should be funded to the maximum permitted by university policy.

**Recommendation 2:** Adopt a funding model that provides an annual stipend or budget.

This model is preferred by a majority of librarians interviewed. Consensus is that this approach is a fair one that empowers individuals to set their own priorities. Crucially, it also ensures that those with the greatest financial need can find opportunities for full funding.

The median faculty member traveled once per year over the past four years. The median cost of a single conference was less than $1,200. A stipend of $1,200 for 2019 would adequately support many of our faculty members.

**Recommendation 3:** Provide an additional stipend, or bonus budget, to untenured faculty members.

Many faculty members spoke passionately about supporting those still on the tenure track more generously. None spoke against it.

An annual supplement of $500 would ensure that untenured faculty members could achieve full funding to attend one major conference each year. Over the past four years, the following national conferences have all averaged less than $1,700 per attending USC Libraries faculty member:

- American Library Association (ALA) Midwinter
- Association of Moving Image Archivists (AMIA)
- Charleston Conference
- Electronic Resources & Libraries (ER&L)
- Library Orientation Exchange (LOEX)
- Music Library Association (MLA)
- Special Libraries Association (SLA)
- Society of American Archivists (SAA)

When necessary, some supervisors may be able to use supplemental funding sources, including but not limited to:

- Funds and endowments (Foundation accounts)
- Revenue (E) funds

**Recommendation 4:** Provide an additional stipend, or budget, for participating faculty members.

Faculty members also spoke passionately about providing adequate support for those peers who are actively engaged in the profession, whatever their tenure status. A high level of funding for participation ensures that faculty are incentivized to stay abreast of the field, and to raise the profile of our Libraries. We hope to retain skilled faculty, and minimize the role of personal economic hardship as a barrier to participation at the national level.
**Recommendation 5:** When possible, provide an incentive to librarians who choose to limit their travel funding requests in a particular year with a reward in the following fiscal year.

The ability to carry forward unspent funds from the previous fiscal year was desired by many librarians interviewed. However, after consulting with the Administration, the Working Group Chair acknowledged the burden posed by carry forward accounting. Tying up a large amount of money in individual funds reduces budgeting flexibility in the current fiscal year, and makes it difficult to plan for the next fiscal year.

In lieu of individual carry forward balances, the Working Group suggests that all requesting individuals who spent below a particular threshold in the preceding year be eligible for a bonus (of a flat amount) the following year. Not only would this simplify individual tracking, but it would also increase flexibility and improve predictive budgeting for the administration.

Librarians may also have access to additional funding, external to the Libraries, which would make savings possible in a given year. Librarians are encouraged to seek out support through:

- External granting agencies and foundations (e.g., National Endowment for the Humanities)
- Internal grants (e.g., Provost’s ASPIRE & Excellence Initiative grants)
- Travel awards from professional organizations (e.g., BRASS Academic Business Librarianship Travel Award)
- Honorariums or stipends from inviting institutions or organizations

For a variety of reasons, librarians may wish to limit their travel to the local sphere in particular fiscal years. Webinars and regional conferences like South Carolina Library Association (SCLA) and South Carolina Archival Association (SCAA) cost comparatively little.

A stipend or budget of $400 would cover the average cost of two regional conferences, and/or several webinars. Librarians who request under this amount would have the option to request an additional $500 above the standard allocation in the following fiscal year. This would carry forward most of the foregone funds to the individual, while still achieving savings for the overall travel budget.

**Recommendation 6:** Strongly encourage informal knowledge transfer within units; encourage more formal knowledge transfer throughout the Libraries.

Many faculty members we interviewed expressed a desire for more opportunities to share what they learn at conferences and other professional development events, acknowledging the benefits not just to the Libraries, but also to themselves. Teaching others can be a highly effective memory aid. Several enthusiastic librarians said that the main barrier they faced was a lack of forums for knowledge transfer.

In contrast, some librarians pointed out that what they learn would rarely be applicable outside of their own units. A small number of librarians expressed great anxiety about having to present, saying it would discourage them from attending conferences in the first place.
While many supervisors interviewed were among those most interested in new forums for knowledge transfer, all of them described established practices of at least informal knowledge transfer within their units.

Thus, a minimum requirement for sharing at the unit level would set a clear expectation without raising a new barrier to engagement. We strongly encourage the Professional Development Committee to establish the following forums in communication with the full Libraries faculty:

- Brown bag lunches, at least two a year (suggested times are August, after the annual meetings of ALA and SAA, and February, after ALA Midwinter)
- A librarian lecture series, with at least one faculty volunteer sharing a presentation they have prepared for a conference each semester (potentially to be advertised outside the Libraries)
- A clearinghouse on the Intranet or other shared location where librarians can share their own presentations (e.g., PPT slides) or materials they bring back from conferences

Weekly reports in LINKS, ideally collected by the Administration (see also Recommendation 9 below), could foster further knowledge transfer throughout the Libraries.

**Recommendation 7:** Provide a discretionary fund for additional support, overseen by the Administration.

The proposed budgets will not cover all travel by all engaged faculty. Moreover, there will always be unexpected opportunities, especially toward the end of the fiscal year. The Working Group recommends a flexible discretionary fund that can be applied strategically.

We recommend a formal application for this process, routed through the Ad Hoc Travel Implementation Committee for aggregated reporting purposes only. Approval decisions would be made by the Administration (i.e., the Dean or a delegated authority).

**Recommendation 8:** Set an ambitious target for growing the available amount of funding for discretionary travel.

In recent years, the Libraries’ travel budget has grown rapidly as new faculty lines have been opened. This pattern is likely to continue in coming years, with several experienced members of our faculty poised to retire.

Our current budget for professional development travel is approximately $80,000. The Working Group urges the administration to grow that amount to $100,000 by Fiscal Year (FY) 2020. To that end:

- We commend Beth Well’s efforts to find funding for travel from private sources and suggest that funds supporting professional development might be established for Thomas Cooper Library, the Music Library, the Office of Oral History, the South Caroliniana Library, and Moving Image Research Collections. (Similar funds have already been established for the Irvin Department of Rare Books and South Carolina Political Collections.)
• We encourage the administration to explore the possibility of Provost-supported startup funds of at least $5,000 over at least 3 years for new untenured faculty members, potentially reducing or eliminating the need for an untenured annual supplement.

The Working Group’s financial projections suggest that an increase of $20,000 would not only support incoming faculty members, but could also increase the distributions available to current librarians. If funds allow, we strongly recommend:

• Paying 100% of conference registration in addition to the stipend selected; this measure helps ensure that faculty attend the conference that is best matched to their professional development, rather than the one that is best matched to their personal budget
• Raising the standard stipend to cover the average cost of travel to at least one ALA or SAA conference, the most frequently attended conferences by faculty in our Libraries; our salaries are below the market average, and an increase of a few hundred dollars for travel support represents only a modest outlay relative to salary market adjustment

Recommendation 9: Introduce procedures to increase transparency and decrease uncertainty.

These should include, but need not be limited to, the measures suggested below (or functional equivalents):

• Confirm each individual’s approved budget for the fiscal year; supervisors CCed
• Share updates on the status of the travel budget at each Libraries Faculty Meeting during the regular Report of the Director of Administrative Services; covered topics should include:
  - The total amount available for that fiscal year
  - The total amount requested for that fiscal year
  - The total amount approved for that fiscal year
  - The total amount spent to date
  - The number of faculty who have traveled to date
  - The conferences they attended
  - The number of faculty who opted for the savings stipend
  - The funding sources used for that fiscal year and in what proportions
  - Knowledge transfer events held
• Maintain and share the above data internally through the Libraries’ Assessment Team
• Include weekly reports in LINKS summarizing the faculty who will be attending conferences; to minimize unintentional oversight, we recommend that this report come from Administration rather than supervisors or individuals
• Require supervisors to complete annual professional development plans for their reporting faculty, a practice at peer institutions that encourages both faculty and supervisors to think strategically about their travel requests
• Introduce a standard budget request form to be completed once annually; individual travel requests for specific events, up to the amount budgeted, will be submitted/accepted on an ongoing basis throughout the fiscal year
• Change the Travel Request Form from paper to an electronic format with auto-calculated fields
• Update the Travel Request Forms to include:
  
  o Standard justifications
  o A commitment to knowledge transfer
  o The estimated cost of the trip even when little or no funding is requested

See also Appendix 1, Sample Forms.

Standardizing procedures for faculty means that they will not only receive more travel funding than staff, but they will also benefit relatively from lowered uncertainty. *We urge the administration to develop a similar process for staff requests.*

**Recommendation 10:** Seek out ways to reduce the traveler’s short-term financial burden posed by travel.

For some faculty members, having to prepay fees and wait for reimbursement is a real barrier to travel. We ask the administration to find ways to lessen this burden. Possibilities might include:

• A re-evaluation of the Libraries travel card policy
• Pre-payment of registration fees
• Pre-payment of membership dues out of Foundation accounts

**A note on implementation and oversight:** An Ad Hoc Travel Implementation Committee has been formed. Its members are:

• Mike Berry
• Jessica Crouch
• Heather Heckman (Chair)
• Andrea L’Hommedieu
• Kathy Snediker
• Jodi Spillane
• Bill Sudduth
• Michael Weisenburg

The Ad Hoc Committee will meet through FY 2020 to get the new process up and running. We suggest that a permanent committee of the faculty, comprised of five members with staggered terms, should be convened by the end of the 2020 academic year.

**Summary Literature Review**

The Travel Working Group conducted a comprehensive literature review on the following topics:

• The benefits of travel for librarians and libraries
• The value of institutional support
• The growing role of virtual attendance in professional development for the field
• Published travel policies and practices for academic libraries

Research suggests that the greatest benefits of professional conferences are professional rejuvenation and networking. Engagement in the field helps to maintain the passion individual librarians feel about their profession and raises the profile of their home libraries. Institutional investment in professional development travel correlates directly with employee engagement in the field. In short, it pays to pay for travel.

The literature also suggested that librarians with subject-area specialties or overlapping areas of responsibility have greater professional development needs, as they must keep abreast of activity in more than one field.

Virtual conferences and webinars are growing in prominence and offer several clear benefits. They cost less, are more easily accessible for most, and have a lower environmental impact. However, they are also less effective than in-person forums at promoting professional rejuvenation and networking, the two most important outcomes of conference attendance. For the foreseeable future, virtual attendance is likely to supplement, rather than supplant, physical attendance.

Few libraries published travel policies, but a December 2009 SPEC Kit provided some data suggesting that institutional support for librarian travel is the overwhelming norm. Out of 72 responding institutions, 8 reimbursed travel and registration in full (11%); 17 reimbursed all of registration and part of travel (24%); and 36 reimbursed part of each (50%); while 6 institutions provided no financial support (8%); and the remaining 5 selected “other” (7%). The type and extent of support varied considerably between institutions. A majority, however, provided a fixed stipend to individual librarians. Of the more than 60 institutions that provided explanatory comments, just over half described a set allocation or stipend system. The next most common set of approaches can best be described as variable or ad hoc with 18% of responses, followed by a percentage rate (7%) and committee/peer review (6%). Other approaches cited, in descending order of importance, were reimbursement of reasonable costs, reimbursement up to a trip maximum, and full funding.

See also Appendix 2: Literature Review.

**Summary of Current Practice at USC Libraries**

The Travel Working Group interviewed every supervisor with at least one reporting faculty member in the Libraries. These conversations suggested that the travel approval process varies between departments. Some supervisors work with their reporting faculty members to control costs; others do not. Some worry about submitting for opportunities that arise after the May deadline; others do not. Some verify that requests are financially reasonable; others do not.

While nearly all requests ultimately submitted to Library Administration are approved for full funding, faculty feedback indicates that a number of informal processes are occurring before that point, suggesting that not all desired travel is being supported. Examples include:
• Librarians within the same department taking turns making requests
• Librarians self-selecting out of travel to allow opportunities for new colleagues
• Librarians revising or abandoning their requests, based on either input from a supervisor or confusion about what they are “allowed” to ask for

Although the method of submitting requests to the administration is quite standardized between units, many supervisors expressed concern that they are “doing it wrong.” A majority are satisfied with the once annual submission process, but a small minority are highly dissatisfied with it. One called it “a disaster.”

Fairness and transparency are recurring concerns. Several supervisors desire a definitive yes-or-no answer for each request.

As noted above, informal knowledge transfer is already happening to at least some extent in all units. However, several supervisors expressed enthusiastic interest in increased knowledge transfer.

Many supervisors displayed an entrepreneurial spirit, commenting that they would like to seek out additional funding sources (e.g., grants, foundation accounts).

Perhaps most importantly, supervisors expressed a high degree of trust in their reporting faculty. While some have concerns about unit staffing during faculty absences, none think that faculty are making unreasonable requests. Indeed, there is a strong consensus in favor of more travel by USC librarians.

Below are a few representative comments:

• Travel should be encouraged to present at conferences and engage with their field at the national level when they are hired, as part of the tenure process. Travel for professional development is the norm.
• We are an ARL library. We not only serve a research faculty, but we ourselves are supposed to be research-oriented.

See also Appendix 3: Results of Faculty Phone Interviews.

Summary of Faculty Feedback

The Faculty Working Group reached out to every individual faculty member to ask questions regarding the travel process and received 41 responses, including all faculty members in a supervisory role (see also above), for a total response rate of more than 85%.

With regard to process, faculty members’ responses about how to disburse funds included a flat amount, a percentage, or random selection. A flat amount is seen by a majority as favorable. Others want unit level budgets or a peer review process for determining travel. Some also had suggestions for the administrative process. Relatively popular ideas include access to an online application form and a rubric for guiding decision-making. There is a general desire for greater
transparency and communication about travel budgets and approvals. A small number of responding faculty want some form of knowledge sharing after conference travel. As for funding priorities, responses reflected a strong desire to prioritize travel for untenured faculty, followed closely by faculty participating at conferences as officers, presenters, moderators, organizers, or committee members. Attendance at conferences having a direct relation to the library or unit were noted as an important consideration, as was the need for extra support for highly specialized positions.

In response to the idea of funding a percentage of requests, respondents were split between a willingness to contribute a portion of their costs and an inability to attend at all if not fully funded.

Those who travel rarely or not at all cited the following as their reasons:

- Personal health
- Family commitments
- Perceived short-staffing in their unit(s)
- Being late-career faculty

See also Appendix 3: Results of Faculty Phone Interviews.

Review of Tenure & Promotion at USC Libraries

Although it is not explicitly stated in University Libraries’ Unit Criteria, travel is an implicit requirement in the tenure and promotion process. It is also highly visible in candidate files. Past chairs of the Libraries’ Tenure Committee indicated to the Working Group that external reviewers are especially attuned to engagement with the field at national conferences.

The 2010 document lists “sustained professional development through participation in continuing education activities, reading of professional literature, or monitoring relevant electronic discussion lists” as an example of “Good” performance in librarianship. While conferences are not the only opportunities for professional development, they are an important site for the exchange of new innovations and best practices in the field. Moreover, this form of professional development is more easily demonstrated to both internal and external reviewers, and weighed more heavily, compared to engaging with the professional literature or listservs.

Travel is perhaps most crucial for fulfilling the Service criteria, which states: “activity in local, state and national professional organizations, especially serving as an officer in such an organization or serving on a committee of such an organization.” “Regular” attendance at professional organizations is considered “Good” performance; serving on a professional committee is considered “Excellent” performance; serving as “an officer or committee chair” is considered “Outstanding” performance. At the state and national levels, participation in committees is likely to require travel, and chairing is almost certain to require travel.

While the Libraries’ tenure document currently does not require research and scholarship, professional conferences historically have been the venue to meet, work with, and engage in research that leads to expertise and productive scholarship within the profession. In many cases it
is only a small step between active participation in a professional organization and conducting research and scholarship in the field. In the current tenure documents, “presenting papers at a *regional*, *national* or *international* level” is considered “Excellent” performance, and “moderating or participating in panel discussions at *local* or *state* level” is considered “Good” performance. We note, too, that publications can result from presentations at the national or international level. These could qualify as “Outstanding” performance.

Post-tenure review utilizes the same criteria as tenure, and the Provost is considering implementing a more rigorous system that might involve outside reviewers. An additional factor to consider is that more experienced, tenured faculty may play a role in helping less experienced, untenured faculty successfully navigate conferences.

**Analysis of Recent Data on Travel at USC Libraries**

Data on travel costs has been gathered for the 2014 through 2017 fiscal years and shows a fair amount of variation in travel expenses. The average (mean) is $1,059 per request over the past few years. However, the standard deviation is high, and with a minimum request of $16 and a maximum over $3,700, the average is a measure of limited value.

The data also reveals that travel spending has dramatically increased over the past few years due mostly to an increase in the number of travel requests, as well as rising travel costs and other variables such as location. We predict continuing increases as the demographics of our faculty continue to shift toward more early- and mid-career librarians.

Using the 2015-2016 fiscal year as a representative example, 50% of requests for a single trip came in under $1,000, and 80% of requests for a single trip came in under $1,500. We assume that costs will go up and down over time, and we need to be cautious about over generalizing from a single year’s data; however, an analysis of the mean cost of travel over time shows individual requests approaching an average of $1,000 per trip. Aggregated data from all years available averages to $1,159 for the 50th percentile and $1,727 for the 80th percentile.

See also Appendix 4: Data on Travel at USC Libraries.

Note that the Working Group searched unsuccessfully for published national data for library conference costs.

**Summary of Alternative Models**

The Working Group reviewed formal and informal documentation of the travel policies of peer, peer-aspirant, and other research institutions. We received feedback from individuals at 19 institutions, including 2 peer institutions (University of Florida, University of Tennessee) and 7 peer-aspirant institutions (Duke University, North Carolina State University, University of California-Berkeley, University of Illinois, University of North Carolina, University of Southern California, University of Texas). We also reviewed an ARL email thread on this issue with responses from 7 additional institutions. Finally, we gathered feedback on experience at past institutions from 10 responding librarians here at USC.
Most institutions use one of two main funding models: an annual allocation or stipend per librarian at a specified amount, or a percentage reimbursement (up to 100% in some cases) of requested funding, determined by either a committee within the library or library administration. The annual stipend model is the most common among the policies reviewed, and it is also the model preferred by University Libraries faculty based on solicited feedback (see above).

At the institutions that provide an annual stipend, the details of the policies vary in several significant ways. First, the allocations range from $300 to $3,000 per librarian. Among responding peer and peer-aspirant institutions, 5 allocated stipends, with an average allocation for domestic travel of $1,450. A majority of institutions provide a higher allotment or additional supplement to untenured librarians or librarians within the first few years of their appointment. Many institutions also make some distinctions between the type or purpose of travel and the level of reimbursement. For example, one library provided a standard bonus of $600 to librarians presenting or serving in organizational governance at conferences.

Administrative travel (i.e., not for professional development) and other mandated travel are generally reimbursed in full and not taken from an individual’s allocation. In the case of travel which is related to professional development, several policies provide either full funding or channels to request additional funding when an individual’s travel involves presenting, moderating, or active committee or other service work for the organization (what we define elsewhere as “participation.”)

Several policies include some unique characteristics that are worth mentioning. Two institutions provide an annual allocation to cover transportation and per diem expenses, while separately reimbursing registration fees at 100%. Another institution reimburses all costs above the first $200 in registration fees. One institution specifically mentioned allowing individuals to carry forward unused funds into the next year. A few have separate funding amounts based on location categories (local v. out-of-state v. international), and 4 libraries specifically mentioned supporting international travel with either higher allocations or supplemental funding. One had a lottery for international travel.

Not all institutions provided information related to knowledge transfer after travel, but of those that did only one indicated that a report is a required part of the funding process. A few had policies that were vague (e.g., “expected to share benefits in appropriate form”) or unenforced (“supposed to fill out a one-page questionnaire but no one does”). The norm seems to be encouraging informal sharing without a formal requirement.

Finally, most reimbursement procedures were similar to those of University Libraries in requiring receipts for hotels and other expenses with the option to have airfare paid directly by the library. However, many also prepay registration, and a handful reimburse membership fees. Four institutions allow use of university cards to pay for travel to avoid the need for reimbursements.

See also Appendix 5: Travel Policies at Other Institutions.
Appendix 1: Sample Forms

TRAVEL BUDGET REQUEST FORM

Name: ___________________________ Position: ___________________________
Department: ___________________________ Tenure (check one):  □ Untenured □ Tenured

A good faith estimate of my travel expenses for the upcoming fiscal year follows:
Traveler’s Signature: __________________________________________ Date: __________

The event(s) I plan to attend are:

  First priority: __________________________ Estimated cost: __________
  Second priority: __________________________ Estimated cost: __________
  Third priority: __________________________ Estimated cost: __________  TOTAL: __________

These estimates are to help you determine which budget option will work best for you. They will also be used by the Ad Hoc Travel Implementation Committee to make an overall budget estimate for the year, so please make the most accurate estimate possible at this time. See reverse for more information.

Select one (1) budget option for the upcoming fiscal year:*

□ Savings Budget ($400): Available to all library faculty members, and fulfills eligibility requirement to request “Bonus Budget” option next fiscal year

  □ I do NOT plan to travel or request funding this fiscal year (for planning purposes only)

□ Standard Budget ($1,200): Available to all library faculty members each year with no eligibility criteria

□ Bonus Budget ($1,700): Must meet one of the following eligibility criteria to request this option:

  □ Untenured faculty member
  □ Used the Savings Budget option in the previous fiscal year
  □ Will present OR serve in organizational governance in an elected or appointed capacity (documentation required for reimbursement)

*Requests for funding of additional travel or professional development opportunities beyond the approved budget can be made to the Discretionary Fund. These requests will be accepted on a rolling basis by the Chair of the Ad Hoc Travel Implementation Committee and forwarded to Library Administration.

  □ I plan to ask for additional support from the Discretionary Fund this fiscal year

Supervisor’s Signature: ___________________________ Date________

Instructions
To take full advantage of all built-in features, you must open this form in Adobe software. Something not working as expected? Email Heather Heckman (heckmanh@mailbox.sc.edu).

**Name:** Your (traveling faculty member’s) full legal name, as it appears in VIP.

**Position:** Your job title in the Libraries.

**Department:** Your unit. If you do not see your unit in the dropdown menu, you may overwrite this field.

**Tenured/untenured:** Check whether you are tenured or untenured. You are considered untenured until the start of the fiscal year in which you receive your tenured status and pay raise.

**Traveler’s signature & date:** You may sign digitally or print and sign the paper copy. You can find more information about creating a Digital ID here: helpx.adobe.com/acrobat/using/digital-ids.html

**The events I plan to attend are:** Enter up to three (3) events you plan to attend. The First priority event is your top/highest priority; the Third priority event is your bottom/lowest priority. Enter the corresponding Cost estimate(s) in the adjacent field(s). This year’s TRAVEL AUTHORIZATION FORM will autocalculate many of your expenses; you may wish to use it as you draw up your estimate. In addition, the following historical averages & minimums are offered for calculation purposes:

<table>
<thead>
<tr>
<th>Event</th>
<th>AVERAGE</th>
<th>MIN 2016</th>
<th>MIN 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single conference</td>
<td>$975</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>ALA</td>
<td>$1,575</td>
<td>$350 (Orlando)</td>
<td>$1,725 (Chicago)</td>
</tr>
<tr>
<td>ALA Midwinter</td>
<td>$1,300</td>
<td>$1,250 (Boston)</td>
<td>$975 (Atlanta)</td>
</tr>
<tr>
<td>AMIA</td>
<td>$1,425</td>
<td>$1,300 (Portland)</td>
<td>$1,575 (Pittsburgh)</td>
</tr>
<tr>
<td>Charleston Conf</td>
<td>$1,000</td>
<td>$1,500</td>
<td>$1,150</td>
</tr>
<tr>
<td>LOEX</td>
<td>$1,175</td>
<td>$950 (Pittsburgh)</td>
<td>$1,125 (Lexington, KY)</td>
</tr>
<tr>
<td>MLA</td>
<td>$1,275</td>
<td>$925 (Cincinnati)</td>
<td>$1,1225 (Orlando)</td>
</tr>
<tr>
<td>SAA</td>
<td>$1,200</td>
<td>$1,300 (Cleveland)</td>
<td>$675 (Atlanta)</td>
</tr>
<tr>
<td>SCAA</td>
<td>$75</td>
<td>$50</td>
<td>No data</td>
</tr>
<tr>
<td>SCLA</td>
<td>$150</td>
<td>$105 (Columbia)</td>
<td>$75 (Columbia)</td>
</tr>
<tr>
<td>SLA</td>
<td>$1,650</td>
<td>$1,650 (Philadelphia)</td>
<td>$1,000 (Phoenix)</td>
</tr>
</tbody>
</table>

(Average data is drawn from Fiscal Years 2014-2017 and rounded to nearest $25. All figures include registration.)

**Select one (1) budget option for the upcoming fiscal year:** Select the Savings Budget if you plan to limit your travel this year. This option covers the cost of average attendance at in-state conferences (e.g., SCLA, SCAA) and confers eligibility for the Bonus Budget in the following fiscal year.

If you do not have concrete plans to travel this year, please check, I do NOT plan to travel or request funding this fiscal year (for planning purposes only). Checking this box helps the Ad Hoc Travel Implementation Committee make informed budgeting decisions. It is not a binding decision. You will have access to the Savings Budget and, should a need arise, the Discretionary Fund.
Everyone is eligible for the **Standard Budget**. It covers the average cost of attendance at a single conference, and the minimum cost of attendance at most major conferences most years. Select this option if you need more support than the Savings Budget, but are ineligible for the Bonus Budget.

You are eligible for the **Bonus Budget** if you are untenured faculty, opted for the Savings Budget in the previous fiscal year (beginning in FY 2020-2021), OR will participate in ALL the events you attend this year. Select this option if you are eligible AND if you require $1,700 or more in financial support.

For more information on eligibility and other topics, see the Libraries Travel FAQ.
TRAVEL AUTHORIZATION FORM

TRAVELER INFORMATION
Name ___________________________ VIP ID
______________________________
Department ________________________ Position
______________________________

TRIP INFORMATION
Destination __________ Event attending __________
Departure date ______ Return date ______
Departure time ______ Return time ______

Purpose (check all that apply)
☐ Attending a conference ☐ Attending a workshop
☐ Collection pick-up ☐ Donor visit
☐ Exhibit ☐ Invited talk on behalf of the Libraries
☐ Participating in organizational governance in an elected or appointed capacity*
☐ Poster at a conference* ☐ Presenting at a conference*
☐ Required training ☐ Other (please describe) ________________________

* Please attach supporting documentation.

ANTICIPATED EXPENSES
Air & land transport
Mode _______ Estimated cost _______
☐ Please purchase my airfare through an approved travel agency

Road transport
Personal vehicle (rate = $0.50/mile)
Mileage _______ Depart from Thomas Cooper Library

State vehicle
Size required _______
☐ I am authorized to drive a state vehicle and request a rental

Registration
Estimated cost _______
☐ Please reimburse my registration before I travel

Subsistence
Accommodations
Nights _____ Rate/night (include all taxes & fees) _____

Meal allowance
  Meals on departure day ______
  # full days ______
  Meals on return day ______

Ground transportation
Mode ______ Estimated cost ______

Other
Item ______ Estimated cost ______
Item ______ Estimated cost ______
Item ______ Estimated cost ______

TOTAL ANTICIPATED EXPENSES ______

AMOUNT(S) FROM OTHER SOURCES
Source ______ Estimated amount ______
Source ______ Estimated amount ______
Source ______ Estimated amount ______

AMOUNT REQUESTED FROM LIBRARIES TRAVEL FUND ______

KNOWLEDGE TRANSFER
I plan to share what I learned in the following ways (check at least ONE)
☐ Circulate a summary in LINKS ☐ Participate in brownbag
☐ Report to my supervisor ☐ Present my slides or paper
☐ Share information with colleagues in unit (e.g., at a staff meeting)
☐ Share my slides or paper internally ☐ Other (describe) ______________________

I request authorization to travel and certify that the amount requested does not exceed my approved budget.

Traveler’s Signature __________________________ Date ______

I verify that this request is appropriate in purpose and amount.

Supervisor’s Signature __________________________ Date ______
For Libraries Administration Use Only

Amount Funded _________  Fund # _________  Class _________

I approve this request.

Dean or Associate Dean Signature ___________________________  Date _________
Instructions

To take full advantage of all built-in features, you must open this form in Adobe software. Something not working as expected? Email Heather Heckman (heckmanh@mailbox.sc.edu).

Name: Your (traveling employee’s) full legal name, as it appears in VIP.
VIP ID: Your VIP ID.
Department: Your unit. If you do not see your unit in the dropdown menu, you may overwrite this field.
Destination: Where you are traveling. Include city AND state, separated by semicolons if you have multiple destinations.
Event attending: If you are attending or participating in a conference, workshop, exhibit, program, training, or other event, list the name of the event here. If you are picking up a collection or visiting a donor, you may leave this field blank.
Departure date: The day you will depart. If a portion of your trip will be spent on leave, list the FIRST day you are working.
Departure time: The time of day you plan to depart.
Return date: The day you will return. If a portion of your trip will be spent on leave, list the LAST day you are working.
Return time: The time of day you plan to return.
Purpose: Check all the reasons for your trip that apply. If you select Other please describe it in the adjacent text field. If you are participating in the event and have received the bonus budget, please provide documentation of your participating (e.g., an acceptance email, a schedule with your name on it, a committee roster).

Air & land transport: Select the Mode of transportation you plan to take TO your destination. The dropdown menu includes air, bus and train. You may also overwrite the field with another value if appropriate. Enter the estimated cost of your chosen mode of travel in the adjacent Estimated cost field. Maggie Bergmans can book your AIR travel through an approved travel agency and prepay your airfare. Check the box that reads “Please purchase my airfare through an approved travel agency” if you are interested in this option. If you choose to pay for your airfare, or if you elect to take a bus or train, you will be reimbursed after you return.

Personal vehicle: If you are traveling to your destination in your own personal vehicle, you can be reimbursed at the rate of $0.5050/mile. Enter an estimate of the mileage you will travel in the Mileage field, and the subtotal will auto-calculate in the adjacent bold field. If it would be less expensive to fly to your destination, the amount you will be reimbursed will be capped at the cost of a plane ticket. By default, you will Depart from Thomas Cooper Library. If your point of departure will be different, overwrite this field with an address.

State vehicle: You may request a rental through the state motor pool to travel to your destination. You must be an approved state driver to qualify for this option. If you qualify, the cost of the rental will be paid by the University, and you will be issued a card for gas mileage. Check the box that reads, I am authorized to drive a state vehicle and request a rental, if you wish to use this option. Select the size car you wish to reserve from the Size required dropdown menu. You may overwrite the field with a different size if what you need is not represented in the menu.
Registration: Estimate the cost of your registration. Maggie Bergmans can reimburse the registration fee for most events before you travel using a pay request. If you would like to select this option, check the box that reads Please reimburse my registration before I travel and attach a copy of your registration to this form. In some cases it may be possible for Maggie Bergmans to prepay your registration. Contact her (MAGGIEB@mailbox.sc.edu) if you are interested in institutional prepayment.

Accommodations: Enter the number of Nights you plan to attend, and the Rate/night, inclusive of all taxes and fees. If the rate varies over the course of your trip, we recommend entering the highest nightly rate quoted. A subtotal will autocalculate. It cannot be overwritten.

Meal allowance: Select the meals you will claim on departure day. You are eligible for breakfast, lunch & dinner (b, l, d) if you leave before 6:30 am. You are eligible for lunch & dinner (l, d) if you leave before 11, and for dinner (d) only if you leave before 5:15. Select the number of full days you will be at your destination. For example, if you depart on Friday and return on Monday, you would enter 2 (Saturday & Sunday). Finally, select the meals you will claim on return day. You are eligible for breakfast, lunch & dinner (b, l, d) if you return after 8:30 pm. You are eligible for breakfast & lunch (b, l) if you return after 1:30 pm. You are eligible for breakfast only (b) if you return after 11 am. An out-of-state meal allowance subtotal autocalculates in the adjacent bold field. You cannot overwrite it. Note that if your travel is in-state, you will be reimbursed at a daily rate of $25, rather than $32.

Ground transportation: Select the Mode of transportation you plan to take to and from the airport (train station, or bus depot). You may overwrite with a different value if appropriate. Enter the Estimated cost roundtrip.

Other: Select the Item for which you are requesting support. The dropdown menu includes hotel parking, airport parking, and baggage fees values. You can also overwrite the field if appropriate. Enter the Estimated cost of each item. A subtotal for other costs will autocalculate in the adjacent bold field. It cannot be overwritten.

TOTAL ANTICIPATED EXPENSES: This field auto-calculates. It cannot be overwritten.

AMOUNT(S) FROM OTHER SOURCES: Select the Source. The dropdown menu includes grant and event sponsor values. You can also overwrite the field if appropriate. Enter the Estimated amount of support for each source. A subtotal for external support will autocalculate in the adjacent bold field.

AMOUNT REQUESTED: Enter the amount you are requesting from the Libraries’ Travel Fund.

I plan to share what I learned in the following ways: If your request is for administrative travel, you can skip this section. If you are traveling to a conference, workshop, or other professional development event, you are required to share what you have learned with your supervisor. The Report to my supervisor box will be checked by default. You are encouraged to share what you have learned with your peer librarians. Please check as many other options as apply. If you select Other please describe it in the adjacent text field.

Sign & date: You may sign digitally or print and sign the paper copy. You can find more information about creating a Digital ID here: helpx.adobe.com/acrobat/using/digital-ids.html
DISCRETIONARY TRAVEL FUND REQUEST FORM

Name: ____________________ Position: ____________________

Department: ____________________ Tenure (check one): ☐ Untenured ☐ Tenured

Approved travel budget: ________
Additional amount requested: ________

Justification:

I request authorization to increase my travel budget for the current fiscal year.

Traveler’s Signature: ____________________ Date: ________

I verify that this request is appropriate in purpose and amount.

Supervisor’s Signature: ____________________ Date: ________

For Libraries Administration Use Only:

Amount Funded: ________ Fund #: ________ Class: ________

I approve this request.

Dean or Associate Dean Signature: ____________________ Date: ________

Instructions
To take full advantage of all built-in features, you must open this form in Adobe software. Something not working as expected? Email Heather Heckman (heckmanh@mailbox.sc.edu).

Name: Your (traveling faculty member's) full legal name, as it appears in VIP.
Department: Your unit. If you do not see your unit in the dropdown menu, you may overwrite this field.
Tenured/untenured: Check whether you are tenured or untenured. You are considered *untenured* until the start of the *fiscal year* in which you receive your tenured status and pay raise.
Approved travel budget: Enter the travel budget you were allocated at the start of the fiscal year.
Additional amount requested: Enter the *additional* amount you are requesting. Example: if your trip will cost $2,000, and you were allocated an annual travel budget of $1,700, you would enter “300.”
Justification: Describe the anticipated impact of your travel. Consider your own professional development, as well as benefits to your unit and to the Libraries as a whole.
Sign & date: You may sign digitally or print and sign the paper copy. You can find more information about creating a Digital ID here: [helpx.adobe.com/acrobat/using/digital-ids.html](http://helpx.adobe.com/acrobat/using/digital-ids.html)
Appendix 2: Literature Review

Benefits of Travel
Research on funded travel for librarians suggests that the largest perceived benefits are professional rejuvenation and networking, in that order. For example, in a 2007 survey of 794 librarians (the largest of its kind), Vega & Connell found that the most valued outcome of professional conferences was professional rejuvenation. Networking was most frequently selected as the second-most valued outcome.

“Professional rejuvenation” refers to the idea that conference attendees leave feeling a renewed sense of pride in their work. As one librarian surveyed put it, “[Conferences] are stimulating and fun. I always have more energy and enthusiasm for my work when I return.” Another librarian summed up networking: “Lunch… when a bunch of people sit around and talk, this is where the real action is at a conference” (Vega & Connell 510-511).

Successful networking depends upon a diverse mix of attendees. Conferences provide, “The opportunity to meet and share experiences with more experienced librarians. Their career guidance is invaluable” (Vega & Connell 511). Without senior librarians in attendance, mentoring opportunities are diminished for librarians beginning their careers. Conversely, conferences can serve as recruiting pools for promising talent.

Librarians surveyed, and academic librarians in particular, also valued (in roughly descending order):
- General sessions
- Committee meetings
- Invited papers
- Exhibits
- Roundtables
- CV “padding” (Vega & Connell 508).

Many of these opportunities are notably linked to the tenure and promotion process. Nevertheless, they were perceived as less important than professional rejuvenation and networking.

Intangible benefits accumulate at the institutional level. Conference attendance can “promote innovation” within the library. And we all “profit from motivated and engaged staff” (Dumbell 13). A 2013 study of library administrators noted that the dissemination of faculty research, which often necessitates travel, resulted in crucial “recognition for the university” (Perkins & Slowik 152). Such an outcome might be particularly desirable for our library as the University pursues its research Excellence Initiative in this and coming fiscal years.

Value of Institutional Support for Travel
There is a strong correlation between institutional support for travel and individual engagement with professional development activities. Support for professional development activities is a stated goal of ACRL. In addition to enhancing the knowledge and skills of librarians, participation in academic associations beyond the home institution also “heightens motivation,
and contributes to the individual’s longer term progress and achievements” (Havener & Stolt, 25). Shared responsibility for professional development is a reality of most academic libraries, and an “overwhelming majority” of academic libraries offer “some type of institutional support for professional development activities” (Havener & Stolt, 26, 27).

A high percentage of libraries support attendance at national library association meetings by providing travel funds, and Havener and Stolt have found that there is “a positive correlation between institutional support for meetings and actual meeting attendance.” They further observe:

librarians with institutional meeting support had statistically higher rates of library association membership and committee service. The majority of those eligible for meeting support served on at least one library association committee, a service rate almost twice as high as that of their non-supported colleagues. (29, 30)

It is clear that institutional support is a powerful motivator for individual professional development and that travel often leads to other tenure and post-tenure related criteria such as committee service and research. Given that there is a positive correlation between travel funding, professional development, and service, it stands to reason that travel is not only an implicit criterion for promotion, but also a means through which the library may gain a greater national and international reputation.

While travel funds for professional development in the field of Library and Information Science have a clear and immediate effect on both individual librarians and academic libraries in general, it has also been shown that individual librarian involvement with non-library, subject-specific organizations can benefit libraries, users, and the disciplines with which librarians engage. Tomaszewski and MacDonald have shown that a “subject-specialist approach increases the effectiveness of collection development, classroom instruction, and faculty liaison interactions” (583). The opportunity to network with and learn from subject-specialists both increases the quality of library user experience and promotes the institution's reputation and collections to a broader audience. Furthermore, Bennett has argued that librarian membership in non-library professional organizations has significant benefits and that “librarians should be encouraged to join and participate in such organizations, for the benefit of both their libraries and the organizations” (49).

However, a finite amount of funding may force an individual to choose between a library-focused conference, such as ALA, or a subject-specific conference such as the Modern Language Association or the American Historical Association. Lucy Eleonore Lyons has pointed out that while “neither type of event can be responsibly ignored,” not all “subject areas for which librarians have responsibility are perceived to be adequately covered at library events” (180, 181).

Given the increased emphasis on multidisciplinary approaches and the need to stay current in both library and related subject trends, it behooves institutions to consider a diverse array of professional development opportunities with regard to travel fund allocations.

**Virtual Conference Attendance**

Technological breakthroughs and the economic downturn of 2008 both contributed to rising interest in virtual conferences and webinars.
Virtual attendance has the following benefits over traditional in-person attendance:

- Lower cost
- Lower opportunity cost
- Lower environmental impact
- Less inconvenience
- Greater diversity

There are several cost savings associated with virtual conferences. Perhaps most obviously, they save the institution travel costs. They tend to have lower registration fees, as well. In some cases, it is possible to pay a single fee for multiple registrants (e.g., by projecting the webinar in a classroom). As one ALA member noted in a roundtable discussion on the subject, virtual professional development may be especially valuable for librarians at the beginning of their careers, when the costs of travel are particularly difficult to manage, and when professional training has the highest return on investment (Antell et al. 38). We might add to this list established librarians who are looking to diversify their experience and venturing into a field outside their core area of expertise.

Virtual conferences may also economize on opportunity cost. A faculty member attending a conference is not completing their regular duties to the Libraries. Travel time is eliminated, and faculty members retain access to their own work spaces and materials between virtual events.

We should acknowledge that physical travel incurs a substantial environmental cost at the societal level. Anderson and Anderson attempted to quantify the carbon footprint for European attendees at a London conference, and found that virtual attendance would save more than 430 metric tons of carbon (10), the equivalent of a year’s driving of 330 passenger vehicles. Flying, in particular, has an elevated carbon impact, accounting for 97% of the authors’ total calculation (11). Virtual attendance is one way to reduce this impact. When physical attendance is necessary and many faculty members are traveling to the same location, we might encourage carpooling as a means both to reduce monetary and environmental cost. Carbon offset purchases cannot be reimbursed by the university, but faculty interested in reducing their personal carbon footprint might also opt to offset their own professional travel.

Also, virtual sessions eliminate the considerable hassles associated with travel, as well as separations from family and friends and breaks in routines. While traveling, it may be more difficult to adhere to habits that are important to our health, like special diets or regular exercise. These facts are not negligible, and may significantly decrease quality of life, especially for individuals who must travel frequently.

Lowered barriers to attendance might translate into greater diversity of attendees for virtual conferences (Antell et al. 38). Not only is diversity important in its own right, it may also improve decision-making outcomes. This holds great appeal for working groups and committees, and indeed many committees are virtualizing their activities. For example, the College Libraries Section of ACRL stopped holding in-person ALA Midwinter meetings as early as 2002, and found that members appreciated the change as one that ultimately allowed for “more substantive discussions” around “more complicated issues” (Richards 80).
For all of these advantages, virtual conferences also have several drawbacks. These include:

- Slow adoption
- Attentional difficulty
- Reduced networking opportunities
- Reduced opportunities to experience new or different environments

The reality is that most professional associations still conduct most of the business of their conferences in person, and will continue to do so for the foreseeable future. This may be due in part to technological issues that have not yet been fully resolved: “A broken projector means the presenter does without his or her PowerPoint; a broken virtual reality device will mean … no conference at all” (Antell et al. 38).

When virtual attendance is possible, it may be less effective than in-person attendance. Virtual attendance often happens on personal devices, which encourage multi-tasking. Multi-tasking, research suggests, results in poorer outcomes. Virtual attendance also happens in personal work spaces, where other work may prove equally distracting. Anderson and Anderson, strong proponents of virtual conferences, concede, “a face-to-face conference provides opportunity to ignore home responsibilities and more completely immerse oneself in the flow of the conference,” even if face-to-face conferences are themselves not free of distractions (5).

Networking, one of the most important outcomes of conference attendance, is reduced in both quantity and quality in a virtual environment. Social media can provide important networking outlets, but research suggests that face-to-face interactions remain vital for social interactions. In the words of one ALA member:

I’m not sure how, without face-to-face conferences, I would have found some of the formative librarian friendships and connections that have influenced and educated me, brought me new opportunities, buoyed my morale through rough patches, and broadened my perspectives. In my virtual conference experiences to date, chat has served as the primary medium for communication, and it still feels like a very limited mode of interpersonal interaction. And you can’t bring me chocolate from Portland, nor can we share a meal in a new city, via chat. The face-to-face experience still feels richer, more immersive, and more participatory to me. I’d also estimate that more than half of the insights and ideas that I bring home from conferences come from unscheduled and informal interactions, rather than formal conference session content. I am finding recently that Tweets can add significantly to a conference experience, either face-to-face or virtual, but there is no virtual substitute yet for the real thing. (Antell & Strothmann 38)

There are also benefits associated with going to different places, experiencing different regional cultures, and directly observing different ways of doing things. This, too, has value.

In sum, virtual attendance is already an important supplemental strategy for professional development, and will likely grow in importance in that role. It is not, however, a replacement for travel to face-to-face conferences and workshops. We must assume that professional development will continue to necessitate faculty travel.
See also Appendix 6: Select Annotated Bibliography.
Appendix 3: Results of Faculty Phone Interviews

Supervisor Interviews

All supervisors reported following the same basic process for their unit’s annual travel request in May. Supervisors ask faculty members to provide a list of conferences they plan to attend, and then the supervisors aggregate these lists to send on to the Director of Administrative Services. Supervisors unanimously reported that their standard operating procedure was to put forward all requests for faculty travel they received.

The process might differ in minor ways. Some supervisors asked faculty members to fill out a Travel Authorization Form; others asked for a blanket estimate. Some reported doing follow up research to check the estimates; others accepted the numbers they were given. One supervisor said they often asked for conference names/locations alone, and then prepared the estimate on behalf of their reporting faculty.

Despite standardization of the process across the units, there was a striking level of uncertainty about normative or correct practice. More than one supervisor worried that they were doing it incorrectly, or felt sure other units worked from an allocated annual budget. Three commented that they were uncomfortable with the fact that they were unaware of whether approval was granted after they submitted their estimates. They wished for an unambiguous notification about which requests were and were not funded.

Most supervisors said they had on occasion encouraged someone to ask for more or less, but in general there was a high level of trust in the estimates prepared by reporting faculty. Several recalled cases where a faculty member’s estimate was unrealistically low, typically a junior faculty member still relatively new to the profession. Some supervisors said they had also intervened to increase the amount requested when a faculty member attended a particular conference for the first time, or when they traveled to an unfamiliar city or region. At other points, often in a context of budget shortfalls throughout the Libraries, supervisors recalled exerting downward pressure on estimates. Most were at pains to communicate that these cases were the exception, rather than the norm. One said, “I have never denied anyone yet. I have never seen an unreasonable request.”

Several supervisors reported working with the faculty in their units to keep costs down. Four noted that they work with faculty in their area to avoid sending more than one person to the same conference, or, in cases where everyone has the same specialization, to minimize the number attending in any given year. Three reported that they consciously asked for less in their own travel reimbursement requests so that there would be more to distribute to faculty in their respective units. Two reflected on the issue from a value-based perspective, and said they felt it was right to encourage faculty to economize when they travel.

Most supervisors were satisfied with the current fiscal year calendar, but an important minority were very dissatisfied. For many, preparing an estimate in May was unproblematic. Several pointed to the fact that ALA announces its schedule a full decade in advance. Two had mixed feelings. One appreciated the fact that the May deadline prompted employees to plan, but worried about all the many things that pop up unexpectedly throughout the year. Another heard frequently from faculty that it was easy to predict which conference they would attend, but difficult to
predict the amount they would need that far in advance. Variables like whether their proposal was accepted, how many days they would like to attend, and even in some cases actual fee schedules might be uncertain. Two supervisors were highly dissatisfied with the system. One went so far as to call it “impossible” noting that their faculty tend to select which conference(s) to attend in any given year based upon the program, rather than the hosting national organization.

Supervisors for all units but one reported that their unit shared knowledge formally or informally after conferences. Many faculty members report on what they learned in staff or team meetings. As appropriate and when available, some also circulate relevant literature or interesting session recordings. All units, but smaller ones especially, engaged in less formal means of communication, e.g., water cooler gossip. One supervisor sometimes asks returning faculty to circulate a memo with a report on the conference. Reference requires formal presentations, an approach that functions as “service learning” for their faculty members, who must regularly engage in formal instruction. Another supervisor remarked that while reporting faculty members did share knowledge informally, “I would say we don’t do it sufficiently.”

Five supervisors (just shy of a majority) expressed a desire for more formal channels for knowledge transfer available for everyone in the Libraries to share. Four referenced brown bag lunches as a model. Three liked the idea of formal presentations by returning faculty, perhaps in the Scholars’ Corner venue.

No supervisors thought their reporting faculty traveled too much under our current system; five wished reporting faculty could travel more. Four said they have encouraged faculty to attend more or different conferences, in an effort to further professional development and engagement with the national field.

In all of our discussions, supervisors seemed concerned about fairness. Three evoked it explicitly as a value they would like to see upheld, and two more expressed specific concern about low-earning faculty.

Sample comments follow.

On the value of professional development travel:
- Travel should be encouraged to present at conferences and engage with their [faculty members'] field at the national level when they are hired, as part of the tenure process. Travel for professional development is the norm. It’s not something one person does.
- I would like to see, if not more travel per se, then more participation in national organizations.
- We are an ARL library. We not only serve a research faculty, but we ourselves are supposed to be research oriented.

On the “right” amount of travel:
- I might question more than 3 multi-day trips in a single year, just because of the amount of time out of the office.
- In broad general terms, I don’t really think there is any conference where 5, 6, 7 people all need to go [in one year].
I would not say that people need to travel less. There are people who need to travel more. And there are other people who aren’t traveling too much, but who are doing “as much as they possibly can.” There’s a capacity problem if everyone does that.

I would like to see people traveling more. More money would be part of that encouragement.

I take advantage of opportunities to travel myself, and I want to help other people take advantage of those opportunities.

I wouldn’t sign a travel request that didn’t include a justification.

On knowledge transfer:

I would like to see opportunities for Faculty librarians to give formal scholarly presentations, open to colleagues throughout the University community.

I like the idea of sharing what we learn in concept, but I haven’t seen a good way to implement it.

There needs to be a structure in place for knowledge sharing. Even people who want to do it, don’t. Instead they get “swept up in work” after they get back. Ideally, people would commit to doing a presentation or brownbag in advance, so they could be planning for it during the conference. The other issue is expectations. We don’t expect it of people. I would love to see that expectation established.

On funding sources and economizing:

Departments should be encouraged to develop other sources of funding.

I am comfortable with expecting folks to submit a little bit of their own money.

When I or people in my unit travel locally we don’t request any reimbursement.

On the transition to a new system:

Folks who do travel often have multi-year service commitments.

If things are going to change, please give us ample time to adjust to the new process.

PLEASE LET US TRAVEL! WE LIKE IT AND IT IS USEFUL! DON’T DO AWAY WITH IT.

On possible alternative systems:

Perhaps a flat amount could be awarded each year, with the possibility of carrying forward any unspent balance 1-2 years.

A set budget lets individuals or units set budgets and priorities.

I would like to see a sliding scale as salaries increase.

On priorities:

I want to see untenured faculty members prioritized to the fullest extent possible. I understand if others have to put “some skin in the game.”

I would like to see a process that is “eminently fair.”

We have such a low starting salary, people starting out should not have an expectation of putting in 10% or 20% or whatever it is. I’m not sure where to draw the line. Tenured or untenured? Untenured should have some priority, but we also want to see tenured people attending conferences.

In collaboration with [the Director of Administrative Services], I have in the past indicated to tenured faculty who are only attending the conference that they will be reimbursed a percentage of the total amount requested.
• I feel very strongly that the people we owe it to, first and foremost, are the people going through the tenure track, and then people beyond that who have some role in the governance of the organization.

On communication:
• There is no clear notification about whether or not our requests have been funded.
• I like that there is a travel request form. It lets me know what the administration wants to know.
• I may not always know who has been funded at what level.

On timing:
• The biggest issue is the timing issue. Having to estimate one a year places “Midwestern people like me” in the mindset of, “oh, I can’t ask for something later on.”
• I’d like to see funding on an ongoing basis.

On travel for staff:
• Exempt staff are very close to faculty, and they should get to interact on a professional level more than they do. The lack of funding for exempt staff “makes it easier for staff not to consider travel.”
• There are staff members in our Libraries who need to go to conferences, too.

Faculty Interviews
Faculty offered the following ideas about process and prioritization going forward (n). Please note that faculty were not prompted with specific questions about any of these issues. While high response counts may well suggest popularity of a particular value, idea or proposal, low response counts do not necessarily suggest unpopularity.

Tenure:
• I would prioritize travel for untenured faculty members over tenured faculty members (14)
• Examples:
  o If there’s not money for me, I can wait. Prioritize new and upcoming people.
  o Untenured are the low rung of the salary scale.
  o I want to say I’m not discouraging people who have tenure from traveling. If they [the administration] want to get the number down, then I’d put untenured people first.

Committee work/organizational governance:
• I would give highest priority to committee work or participation in organizational governance (1)
• I would prioritize committee work or participation in organizational governance (8)

Presenting research:
• I would give highest priority to faculty presenting at conferences (1)
• I would prioritize faculty presenting at conferences (8)

In the interest of the library:
• I would prioritize travel that’s important for the unit or the library as a whole (6)
• I want prioritization of travel requests to grow out of our strategic plan (1)
• Examples:
  o The library might get a better bang for its buck if greater priority/consideration were given to the probable usefulness of particular conferences and courses for the library and for the individual as far as their professional development goes rather than their classification or status.

Flat amount:
• I would like to see a flat amount reimbursed across the board (at least as a starting minimum) (9)
• I wouldn’t mind a flat amount (2)
• Examples:
  o At this point, I find the idea of a flat rate and then applying for additional funds for a small percentage above the rate appealing.
  o I liked a flat amount because it put it more in the hands of each individual librarian to decide how best to use their money.
  o A flat amount is the most equitable approach.

Percentage:
• I would like to see a percentage system (at least as a starting minimum) (2)
• I wouldn’t mind a percentage system (2)
• Examples:
  o I wasn’t opposed to the 80/20 idea. I thought it was pretty generous in fact.
  o 80/20 might be the hardest for me.

Random selection:
• A lottery felt unfair (2)

Peer review:
• I would like to see peer review (3)
• I would like peer review as a second tier, after a standard rate (or rates) was applied (2)
• Examples:
  o A lot of times it was up to [an administrator]. They made the decision, and it wasn’t up to a committee or anybody else. Leaving it up to [one person] allowed for abuses. A committee that evaluates it is open and transparent to everybody.
  o There should be a committee evaluating what’s the most important stuff. … It should go around the supervisor and right to some kind of group. Maybe the supervisor could put forward the individual for travel in addition to the individual doing it. But there’s lots of people who have favorites and whatnot. I’ve seen that plenty of times. … A small committee not a big committee. Or a big committee distributed so that not everyone has to review everyone.

Unit level budgets:
• I would like to see a departmental budget for faculty travel (4)
• I would like to see department heads work together to set a travel budget (1)
• Examples:
I would like to see unit budgets, with an enormous amount of flexibility within unit budgets.

100% funding:
- I am happy to contribute (3)
- I cannot afford to go at all if it’s not fully funded (3)
- Examples:
  - I will say in the past I have indicated that I would like support for something, but I don’t expect the library to pay for it all, and the library has just said, I’ll pay for it all. There is a tier of faculty members who would be happy getting a subvention for travel, and as long as it was a meaningful percentage, they would manage professional development on their own, particularly if that was a means of supporting travel by individuals to places that were more expensive to get but were of substantial importance for their career.
  - This library has been pretty generous in the past. I would love to continue seeing that being done, but given the fiscal situation I understand we have to make compromises.
  - You’ve got to put something of your own into it to get something out of it.
  - I guess, coming from someone who has little ones at home, it is worrisome if we’re going to have to pay for more of our travel out of pocket, and since it is a requirement of the position, it is something that worries me, because it’s not really something that’s feasible in my personal budget.
  - The bottom line in all this is that a lot of people won’t go unless they’re fully funded.
  - I do feel like asking an employee to pay for something that is required for them isn’t right.

Transparency/communication:
- I would feel better if I had a definite yes (2)
- I value transparency (1)
- I would like a timeline that tells me when I can expect to be reimbursed (1)
- Examples:
  - Seeing the list of everybody’s travel was enlightening. I thought that was good to have that additional layer of transparency.
  - I think part of the problem is that the communication isn’t there to say, hey, which one conference do you want to go to? I’d be interested to see if you asked people which one conference do you want to go to and then totaled that up, would there even be a shortfall?
  - I think the reason we’re even having this discussion, is there’s a breakdown between department heads and admin. I want some sort of formalized system for this is what I actually WANT to do.

Process:
- I want to see a rubric that guides the decision process (4)
- I would like to see an online application (4)
- I want a justification required for all travel requests (2)
- It is difficult for me to pay upfront (2)
- Examples:
I don’t get paid much, and paying upfront is a hardship on me, is there anything that can be done about that?

Many people at one conference:
  - There could be a lottery/random assignment for this (1)
  - There could be a round robin (1)
  - Examples:
    - One way that I’ve thought might be the most work but also might be a good way to do it—if we had a certain number of seats allotted each year to various conferences that we know people need to attend, it might not be too much work to take turns for things like ALA/Loex.

Per diem:
  - It is too low (2)
  - I don’t need it (1)
  - Examples:
    - Orange juice at the hotel cost more than the amount the state supported for breakfast.

Geography:
  - I would like to see different rates for different locations and/or conferences (1)

On one conference per year:
  - I thought this was all that was allowed (2)
  - This would be difficult because my position has hybrid responsibilities (1)

Niche/specialized fields:
  - People in isolated/highly specialized positions need extra support (3)

Annual planning:
  - Estimating once a year is ok with me (3)

Knowledge transfer:
  - I do not want to be required to present when I get back (2)
  - I’d like people required to present when they get back (1)
  - I’d like a forum for people to present when they get back (1)
  - Examples:
    - I think it’s important for people to have the opportunity to present, but I don’t want it to be required. Conferences are very stressful for me, and adding that on top would just be too much. I am happy to share things I learn that I think are relevant to others in a less structured way.

Those who don’t travel:
  - I have reached a point in my career where I no longer feel the need to be so involved, and think it’s appropriate for others to take on that role (3)
  - Family commitments limit my travel (2)
  - I perceive that we are too short-staffed to prioritize my travel (1)
  - Personal health limits my travel (1)
Examples:
  o My family situation prevents me from traveling. I can’t imagine what it’s like for single parents. I don’t even have an opinion on the process because I do it so rarely. I’d like to be able to go to more conferences, but that’s not anything on the university; that’s my circumstances.
  o I’m tenured and senior. For me at this stage, webinars make more sense than travel.

Sample comments concerning fairness and prioritization:
  • I want to avoid a winner takes all scenario.
  • I don’t know how you could do it on the needs basis where someone wouldn’t feel like they weren’t getting the short end of the stick. Senior faculty members—do they need as much support? Maybe they’re in a better place? Maybe it should be slanted to tenure track faculty, but is that fair? How do you get buy-in from all the stakeholders, where nobody feels shortchanged?
  • So far, basically, I haven’t had very grandiose asks. When I saw the list, some people were going to three things a year! We’ve always been limiting ourselves to one. Cutting back would be very draconian in my case.
  • I don’t have extensive conference needs, I’m usually fine with requesting one and then SCLA. I’ve never felt too bad about using that money, it seems reasonable to me. I would like the opportunity to go to a more expensive conference sometimes, but maybe not every year—that might be too big a burden on the Libraries and unfair to others.

Sample comments concerning the value of conferences and other professional development opportunities:
  • I think travel for professional development is something that’s really important. I think more people should do it.
  • It’s easy to come up with weird local practices and not notice. I’m paranoid about it all the time [so value the ability to check in with the larger field].
  • I’d encourage anybody to go because of the experience. There’s so much you can learn from your colleagues.
  • Seasoned professionals or people that had been there for a long time, and they’re trying to get involved, and that’s WHY they’re going, or maybe just trying to reignite interest in the profession... you don’t want to get people that are totally burned out or don’t have the opportunity to go to something, to develop themselves professionally.

Interview Questions Asked of Supervisors Only
  1. How do you prepare your travel estimate for the Director of Administrative Services every May?
  2. Does that deadline work well for your area?
  3. Do you put forward all of the requests your faculty members make? If not, how do you prioritize some requests over others?
  4. Do you ever ask faculty to reduce or increase the amount they request?
  5. Does your area have additional sources of funding for travel?
  6. Do you wish faculty members in your area traveled more or less, or do you feel like it’s been the right amount?
  7. How does your area share knowledge after faculty return from conferences?
Interview Questions Asked of All Faculty (Including Supervisors)

1. How would you like the request and approval process to work for travel for professional development at our library going forward?
2. Have you previously worked at any other institutions that handled travel requests and approvals differently?
3. If so, what was the process? Did you like it? Why or why not?
## Appendix 4: Data on Travel at USC Libraries

### Total Cost of a Single Conference, 2014-2017

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### Total Cost of a Single Conference, Percentiles

![Graph showing total cost of a single conference, percentiles](image)
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<th>Conference or Event</th>
<th>Number of Attending Days</th>
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<th>Total Cost</th>
<th>Cost Per Person</th>
<th># Attending</th>
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<th>Cost Per Person</th>
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<td>Total Cost</td>
<td>Cost/Trip</td>
<td>Average/Trip</td>
<td># Trips</td>
<td>Total Cost</td>
<td>Cost/Trip</td>
<td>Average/Trip</td>
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<td>Average/Trip</td>
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<td>Total Cost</td>
<td>Cost/Trip</td>
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<td>2017</td>
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* Totals, averages, and standard deviations do not include blank cells, and should be understood as aggregations of trips or traveling individuals.
Appendix 5: Travel Funding Elsewhere

A brief summary of data volunteered by contacts at other institutions follows. It should not be considered comprehensive.

Peer-Aspirant Institutions

Duke University
- 100% of reasonable expenses
- $100 per diem covers both hotel & food
- Flat rates for frequently attended conferences may be set at the department level

North Carolina State University
- Variable percentage
- Peers review applications; administrators set rates

University of California-Berkeley
- $1,500 annual stipend (portion guaranteed by union contract)
- Unspent funds carry forward to the next fiscal year
- Membership fees can be reimbursed

University of Illinois
- $1,900 annual stipend
- Additional $500 for untenured

University of North Carolina-Chapel Hill
- $1,000 annual stipend for faculty
- $300 annual stipend for staff

University of Southern California
- Rates set by peer review
- Bonus of $100 to equivalent of untenured
- Registration and airfare can be prepaid

University of Texas-Austin
- 75% of per diem + 100% of flight & registration
- Administrative travel is fully funded

Peer Institutions

University of Florida
- Peer review
- Per conference rates vary; $833 was the amount awarded to out-of-state domestic travel last year

University of Georgia
- Variable annual stipend (faculty share total budget evenly)
- Supplement for participation
University of Tennessee
- $2,000 annual stipend for faculty
- $10,000 startup in lieu of stipend for faculty in first three years
- Peer review for staff travel
- Startup money can be used to reimburse membership fees

Other Libraries
Florida State University
- Annual stipend
- Bonuses for participation
- “Strategic travel fund” divided among Associate Deans

Kent State University
- $450-500 annual stipend
- Variable supplements dependent upon tenure status/participation
  - Up to $2,500 available to active, pre-tenure faculty
- Associate Deans have separate budgets for administrative travel

New York University
- 100% of transportation, hotel, and registration costs above $200
- Includes international travel

Rutgers University
- Variable annual stipend
- Additional funding for documented participation

Temple University
- Annual stipend
- Larger stipend for early career librarians
- Administrative travel is fully funded

University of Arizona
- Choice between:
  - 100% funding for *one* approved trip, OR
  - Funding for registration & lodging only for *multiple* approved trips

University of California-Irvine
- Annual stipend (portion guaranteed by union contract)
- Additional funding divided among Assistant University librarians

University of Hawaii
- $1,500 annual stipend
- Additional funding available from University Research Council

University of Houston
- $2,700 annual stipend for equivalent of tenured faculty
- $3,000 annual stipend for equivalent of untenured faculty
University of Idaho
- $1,200 annual stipend
- Department heads also receive a small budget
- One-page questionnaire required for knowledge transfer, but compliance is low
- Travel p-cards
- Administrative travel is fully funded

University of Iowa
- Annual stipend + 100% registration
- Separate funding for administrative travel

University of Memphis
- Variable annual stipend (faculty share total budget evenly)
- New hires receive $1,000

University of Montana
- $1,500 annual stipend
- Travel p-cards

University of Virginia
- $1,000 annual stipend for tenured faculty
- $1,600 annual stipend for untenured faculty
- $600 bonus for participating faculty
- Required report ~ 1 paragraph in length for knowledge transfer

Additionally, USC Libraries faculty described experience at various past institutions. Characteristics/expectations/practices cited included:
- $700 flat amount (1)
- $1,000 flat amount (1)
- Other flat amount (1)
- Percentage reimbursed (1)
- Particular costs reimbursed (registration and/or airfare and/or lodging, etc.) (1)
- 0% of per diem reimbursed (1)
- Lottery determined who got to travel (2)
- Administrators gave approvals (1)
- Peer review (1)
- Oral peer review (i.e., presentation justifying request) (1)
- Funding limited to a single conference annually (1)
- Flat amount based upon distance/geography (1)
- Proof of participation required for reimbursement (1)
- Requirement to present before attending conference (i.e., practice presentations) (1)
- Requirement to present on what you learned after attending (1)
- Web-based form (1)
- Travel p-cards available (1)
- Membership fees could be reimbursed (1)
- Didn't fund travel to conferences, but did fund classes (1)
- Corporate environment: everything funded with no red tape (2)
Other USC Departments

Chemistry:
- No support
- Use grant funding
- New faculty can supplement with start-up funds

English
- $2,000 annual stipend
- New faculty can supplement with start-up funds

HRSM
- $3,000 annual stipend for tenure-track faculty
- $2,000 annual stipend for non-tenure-track faculty
- New faculty can supplement with start-up funds
Appendix 6: Annotated Select Bibliography

Annotations are EBSCO or author-provided with some minor edits.

Research on Benefits of Travel and Conference Attendance


The authors surveyed librarians to determine the reasons why they do or do not attend conferences, as well as what their attitudes were toward the various conference offerings such as roundtables, poster presentations, and the like. Librarians were queried to gather a variety of demographic and professional data. The resulting data were analyzed to find significant relationships between respondents’ demographic information and their attitudes toward specific conference offerings. The two most cited reasons given for going to conferences were professional rejuvenation and networking, both benefits not directly related to conference content. In addition to quantitative results, respondents replied to open-ended questions, and these qualitative results are included as well.

Conference attendance is a requirement for the career advancement of many librarians, particularly those who work in colleges or universities. Moving from simple attendance to poster session to paper presentation is viewed as the natural progression for the professional development of an academic librarian. The American Library Association and its divisions all tout the many benefits of attending their conferences. Library deans and directors stress the importance of attending conferences to librarians as being an important factor in their career development and advancement. In addition, many librarians themselves see attending conferences as being a necessity part of their job.

The authors surveyed librarians to determine the reasons why they do or do not attend conferences, as well as what their attitudes were toward the various conference offerings such as roundtables, poster presentations, and so on. If conferences are important to librarians’ careers, then it behooves all those involved -- conference planners, presenters, and attendees -- to be aware of librarians’ views toward these conferences.


A large amount of time and resources is spent every year in the library and information science (LIS) sector in Australia to organize, fund and attend conferences. However, the possible benefits of conference attendance for librarians have not been a focus of research in the field. This article, reporting on the findings of a pilot study conducted in the context of a PhD research project, addresses this gap and analyses conference attendance benefits as reported by librarians who attended a specific international conference. The findings of this study link directly to issues and themes that are relevant to all library sectors in Australia.

Many conference events are held annually by organizations in and related to the Library and Information Science (LIS) field. This article examines whether conferences are a beneficial method of professional development, how to decide which events to attend, and what benefits can be accrued by conference attendance. In particular, it seeks to isolate those benefits of conference attendance that are unique, meaning that they could not be achieved through any of the numerous other methods of continuing education. Although the concepts of professional development and continuing education are not identical, they share sufficient similarities to be used interchangeably in this article. The conclusion is reached that conferences are indeed an important method of professional development that affords LIS professionals unique benefits based on recent scholarship in the professional literature and positive evaluation of recent conferences through observation and program analysis.

**Value of Research and Professional Development**


In the summer of 2010, two researchers interviewed twenty-three library administrators of comparable academic libraries at American universities for their views of the value of research in academic libraries. The interview questions focused on the administrators’ perceived value of academic librarians’ research, incentives given to academic librarians to research, factors that influence the administrators’ thinking about academic library research, opinions about the changes in Americans libraries in the past decades, and directions that they see the academic library heading. This paper reflects the answers of these (anonymous) administrators and attempts to analyze patterns in their responses that will be of value to the academic library and its community in America.

**Editorial/Personal Reflection**


In this article, guest writer Ruth Jenkins from Berkshire Healthcare Foundation Trust reflects on two conferences she attended in 2014, LILAC and SLA. Through the process of reflection, she considers the benefits that attending conferences can have to library and information professionals in the health sector. In particular, she discusses the opportunities and areas for learning and professional development that conferences can offer including evidence-based practice and current awareness, gaining new knowledge and objectivity, and networking and the unexpected benefits of conferences. Ruth also offers some practical hints and tips on ways to
facilitate your attendance at conferences, including through awards and funding.


The article provides the author's insights concerning the advantages involved in attending conferences and conventions. He mentioned his early experiences when he attended several conventions. He stated that the conferences provide opportunities for people to listen to the work of others, access the current information in the discipline, present research, organize programs and interest groups, and become part of a network of professional and personal friends. He also encouraged people to attend conferences to become involved in associations because they can provide the benefit of receiving journal articles on latest research.


Attending a professional conference is an effective way to explore and advance knowledge, skills, and careers. For graduate students, attending a conference is an effective way to explore academic fields and new professions. However, attending a professional conference requires precious resources--time and money--so the decision to attend, or not, is often difficult. In this reflection, the author shares her experience and a framework for graduate students, and professionals, to maximize attending professional conferences. Based on her conference experience, reflection, and research, an overarching theme of "making connections" emerged and formed the foundation for a model.

**Supplemental/Specific Environments**


This article stresses the importance of networking and conference attendance in the professional development of librarians.


Today’s global library village includes overseas collaboration between colleagues in various continents seeking to provide effective forums for new librarians. This paper features lessons learned as well as recommendations for colleagues undertaking events involving international collaboration. These are based on the authors’ experiences whilst coordinating a conference for the development of new professionals internationally. Additionally, excerpts from interviews to librarians participating in international efforts are included.

A major challenge facing academic libraries is the need for reference librarians to become knowledge experts in their assigned subject areas. The subject-specialist approach increases the effectiveness of collection development, classroom instruction, and faculty liaison interactions. Simultaneously, this approach creates the need for continuous learning opportunities. Conferences organized around academic disciplines provide a direct connection to subject-specific information as well as opportunities for meeting people who share common interests. With the increase in interdisciplinary and multidisciplinary approaches to teaching and research, the authors argue that attending subject-specific conferences is the best way to keep up with information needs in various fields. This article reviews the benefits of attending academic conferences and discusses five strategies for selecting an appropriate subject conference in any discipline. First-person accounts of conference experiences illustrate these benefits.


*We just thought this was cool… Reasons for conferences haven’t changed much since 1933!

Presents information on the importance of annual conventions to the existence of the National Association of Teachers of Speech and the profession of teachers. Increase in the attendance at the annual convention; Background of the association; Benefits of the conventions to the publication of research studies and monographs.

**Online/Virtual Attendance vs. In-person Attendance**


In order to stay current within their field, many professionals regularly attend conferences and training events in distant locales. Travel to these conferences costs professionals, and their sponsor organizations, both time and money. In the past the benefits afforded by these conferences, and the lack of comparable alternatives, have provided justification for these expenditures. However, recent studies have shown that the cost of travel extends beyond the pocketbook. Transportation is a major contributor of carbon dioxide (CO₂) emissions, a key suspect in the argument for the negative impact of global climate change. This paper examines the potential effects of travel to these conferences on the environment and promotes online conferences as a comparable alternative to face-to-face events. A successful online conference is used to demonstrate the magnitude of the environmental and economical benefits of online conferences. The authors posit that online conferencing technologies have evolved such that they now offer another option for professional development that is effective, economical and environmentally friendly.
The article discusses the importance of face-to-face library conference. Topics include the role of virtual conferences in the professional development, disadvantages of face-to-face conferences including cost, the environmental impact, and time consumed by librarians, and fewer librarians receiving employer funding to attend face-to-face conferences. It also mentions the author works with colleagues over videoconference.


The personal interactions that serve to enhance the overall conference experience tend to be the unorchestrated, unscripted, and unplanned encounters. Irrespective of how carefully a virtual conference is staged—whether it uses conferencing software or even streaming video—it is unlikely to center on the attendees. While the focus of virtual conferences is on the speakers, this is only part of conference learning. Those things that occur in the physical world—hallway conversations, reactions of listeners, and impromptu meetings—are almost impossible to create virtually.


A college library leader reflects on the nature and effectiveness of conference committee meetings conducted virtually via the Internet. The article assesses cost issues and technological aspects of professional meetings.

Sample Travel Policies


UC-Berkeley https://las.lib.berkeley.edu/lbs/travel/procedures-for-funding-approval-requests/travel-training-development-support-policy


Includes “Columbia University Libraries Travel Support Categories and Levels of Funding” as well as special awards granted annually for travel of librarians, p. 76-78.