

SOP Type:

- Internal SOP - DELTA-level that does not directly affect entities outside of DELTA
 External SOP - DELTA-level that affects these entities:
 Unit SOP - DELTA individual unit(s) affected:

Contact:

DELTA Business Office

Effective Date:

October 3, 2012

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1. Introduction

Professional development for staff is important for developing and extending knowledge and skills that benefit our staff in performing their jobs and also in supporting DELTA's growth and visibility as an innovative leader in instructional technology and distance education delivery and services. Attending conferences, participating in webinars, attending professional meetings, attending site-based training, etc., are ways for individuals to retool, renew, and continually build their knowledge base, and in turn, bring back expertise and new ideas that will keep DELTA moving forward as an innovative leader in instructional technology and distance education.

Acknowledging the important role of professional development in supporting renewal and growth for both individuals and our organization, DELTA encourages participation in professional development activities, but must do so within budget constraints and fiscal accountability, and be mindful of work responsibilities to be covered during the employee's absence. Subject to availability of personnel to cover absences and funds within university constraints and guidelines, DELTA will strive to provide funding for professional development opportunities to staff who are actively participating in, or who will otherwise accrue significant job-related benefits from, conferences, professional meetings, targeted skill training, etc. during a given academic year.

2. Guidelines for Allowable/Appropriate Professional Development

Professional development is appropriate for expanding or augmenting the knowledge, skills, and responsibilities directly outlined in an individual's professional position. Professional development activities for DELTA staff should:

ALWAYS:

- Be clearly and directly tied to the current job duties and responsibilities of the employee's position (e.g. must directly be in line with expected duties of the position; there should be a clear tie to a specific conference track, session, targeted skills training, etc. that directly correlates with the current or expected future duties and responsibilities of the position).
- Be fiscally accountable (e.g. the individual, and their supervisor, should be able to articulate a clear business case/reason for the professional development activity, outlining how the experience benefits both the individual's job-related professional development and the DELTA organization).

WHENEVER POSSIBLE:

- Be outlined in the employee's workplan (with some exceptions expected due to job-related opportunities that may arise after the work planning stage).
- Be shared (e.g. staff who return from professional development experiences should be willing to share and seek opportunities to share experiences/lessons learned with their colleagues, in informal and formal ways).

3. Travel Expenses

Travel expenses will be approved for professional development activities that follow DELTA and the university's professional development guidelines.

When travel expenses are incurred while participating in professional development (e.g. airline tickets, hotel reservations, ground transport), per university guidelines staff are expected to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business and spending personal funds. Excess cost or luxury accommodations and services unnecessary or unjustified, or for the convenience or personal preference of the employee in the performance of official university business are not acceptable. International travel requests need advance SMT approval and should not exceed typical expenditures for domestic travel.

The DELTA SMT, working with DELTA managers, will plan a professional development budget each fiscal year, with an amount allocated to each project authorizer to be distributed as equitably as possible across staff. Allocations should be guided by the needs of the team during the year (e.g. required training to update skills, opportunity for conference presentations in line with individual's job responsibilities). Specialized training required, opportunities for multiple conference presentations, or other circumstances in any given year may mean, per individual, that funds allocated and used may be more or less than the average. Thus, while team utilization of professional development funds is at the discretion of the supervisors, DELTA SMT asks supervisors to be mindful of equitable distribution and opportunities for professional development among all staff.

*Note: Travel expenses related to performing the day-to-day duties of the position; for example, traveling to field shoots for production purposes, traveling to an off-site meeting, traveling for student recruitment purposes, etc., are not considered "professional development," but rather, are simply part of the day-to-day cost of doing business.

4. Relevant Definitions and Resources

Professional development: Building knowledge, skills and expertise to succeed in a given role or profession (e.g. job related). "Professional development" is often the term used when an opportunity arises which extends or expands an individual's knowledge, skills and abilities in new and innovative ways, and/or provides an individual a forum to present research (e.g. conference posters, presentations) that has a direct, applicable benefit to the individual's job. Training opportunities are part of professional development, and often require updating specific skills immediately in order for an individual to be able to successfully complete their day to day work tasks (e.g. Smartboard Certified Trainer). Sometimes professional development (including training) activities are local and will not require a travel authorization (e.g. a class at the McKimmon Center such as "Project Management I," or through NC State's Human Resources, such as the Performance Leadership Program). However, other professional development activities may occur beyond NC State University's Campus and will require travel authorization for any reimbursement.

Travel: Expenses incurred when a University Employee is going from one place to another, and/or staying somewhere that is not their usual workstation, where a travel authorization will be completed and a reimbursement requested. Within DELTA, travel may be (a) explicitly required for off-site course production or delivery; (b) related to new student recruitment activity; and/or (c) directly tied to completing tasks assigned to the traveler's position description/job responsibilities. In each of these cases, staff are reimbursed for their mileage and/or other allowable travel expenses depending on the situation. Travel is also tied to professional development, including offsite training; when professional development requires the employee to travel to a conference/meeting/training session, etc., resulting in the need to complete a travel authorization.

NC State Travel Guidelines and Conferences: <http://controller.ofb.ncsu.edu/thetravelcenter/travel-guidelines/>
Travel Requirements for University Employees: <http://controller.ofb.ncsu.edu/files/2014/06/Travel-Requirements-Employees-010515.pdf>