

UUFRC POLICY AND PROCEDURE FOR EMPLOYEE PROFESSIONAL DEVELOPMENT APPROVAL AND REIMBURSEMENT

Adopted January 28, 2015

BACKGROUND: The review of UUFRC financial processes included a finding that accounting for overhead expenses, e.g., use of credit cards was not done in a regular manner. In discussion with the Finance Committee, member Elaine Welch and one of those who conducted the financial records review for 2012-13, explained that the concern had to do with the staff expense reimbursements for professional activities such as had to do with staff expense reimbursements for professional activities such as conferences, UU educational activities, meetings and the like. In fiscal 2013-14 the UUFRC maintained a professional expenses line item for one employee (Director of Religious Education), and established an equivalent line item for two others (Connections Coordinator and Administrator). In keeping with the results of the financial review and the Board of Trustees action, the Finance Committee has developed a policy and procedures for accessing these funds.

POLICY: The UUFRC has established professional development funding for employees. In keeping with good practice, employees are able to access funds for reimbursement of professional development expenses related to their responsibilities as employees of UUFRC up to the limits established by the Board of Trustees in the annual budget. Employees are responsible for securing supervisor approval prior to any professional development activity, applying for access to the funds, and providing documentation of appropriate expenses. UUFRC may change the amount or the categorization of the professional development funds at any time through Board of Trustee action.

PROCEDURE:

1. The responsible administrator for the Policy is the Minister.
2. Those applying for professional development support must obtain approval from the Minister prior to any registration or travel planning occurs, and at least two weeks prior to the event. The request must include amounts anticipated for applicable registration, travel, materials or other items as appropriate. The request must be accompanied by the signature of the individual's supervisor if that person is someone other than the Minister.
3. Requests for reimbursement are only approved for activities related to the individual's UUFRC employment responsibilities.
4. UUFRC will reimburse for registration fees, hotel, airfare (lowest economy fare only), materials required for participation (e.g., workbooks, texts, music, etc.), limited meals other than those included in registration fees, and baggage handling. Mileage will be reimbursed at the applicable federal rate up to the amount of the lowest economy airfare.