SRO Professional Development and Learning authorization process

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NOTE: This is a working document which will be updated regularly as we implement and learn about this process.

This document is meant to provide guidance on the process for seeking and gaining authorization to charge time for Professional Development & Learning (PDL) activities. PDL time includes labor hours associated with conference participation, onboarding activities, formal online and classroom course time, and self-study.

Salary charges for staff will be charged to their respective projects. Non-salary costs related to development and learning will continue to be charged to appropriate overhead accounts. Supervisors and project leaders will work with their staff to ensure they have access to appropriate training activities.

Authorization Process

1. Supervisor and/or Staff initiate a request for Professional Development & Learning.
   a. *Staff* initiating this request should first discuss with their supervisor
   b. PDL requests that involve more than 8 hours of effort should first be approved by the staff person's Unit Director.
2. Project manager(s) impacted by PDL request are informed by supervisor/staff so they can make necessary plans or adjustments to their project plans
   a. Supervisor/staff notify project managers, and cc: Unit Directors, that projects will be charged according to current % allocation on project.
   b. Notification should include
      i. Name of the activity
      ii. Dates
      iii. Total hours
   c. Project managers should let supervisor know if the cost or time away from the project will be problematic. They may contact the Finance Director or the cost analyst on their project if there are any questions regarding projects/allocation %.
   d. If a timing conflict exists that requires a backup resource(s), the supervisor and staff member will work with the project manager to find the appropriate resource if possible.
   e. Project managers can, at this stage, potentially negotiate with the requesting staff person's Unit Director for overhead cost sharing, although for staff largely covered on sponsored projects, use of OH for approved PDL activities should be the exception.
3. Finance team records, tracks, and reports on usage of PDL time
   a. Once PDL time is authorized, supervisors email the Finance team inbox for tracking professional development time (sroprofdev@umich.edu) with the details outlined in 2b.
   b. Finance team will periodically use ET actuals to allocate PDL effort across projects for tracking and reporting purposes.
   c. Changes to plans (e.g. cancelation of a plan to attend a conference) should be communicated to Finance in a timely manner so that the reporting DB can be updated.