

February 7, 2002

«DEANVC»  
«UNIT»

RE: Appropriate Use of Annual Training and Development Allocation

Our office has received a number of inquiries regarding the use of the campus training and development funds that are allocated annually. These funds are intended to enhance and promote the professional development of our staff employees. Training and development funds are appropriate for full or partial payment of the following costs: tuition, registration fees, program costs, books and materials that provide instructions for a specific task/activity, limited travel expenses directly related to a training and development activity<sup>1</sup>, and lodging and meals that are necessary for a training and development activity.

Training and development funding is not appropriate for the following costs: business travel and business meetings; professional organization memberships (Exception: Training and Development funds may be used for professional memberships when the sum of the member cost of a training and development activity plus the membership fee is less than the non-member cost of the activity; memberships are subject to approvals -- P&P 330-75), computer hardware or software or for any other office equipment that would normally be purchased using departmental operating expense and equipment funds (e.g., Palm Pilots, cell phones, beepers, etc.)

The University fosters a climate of continuous learning, skill development, career development, and creativity by supporting training and development. The overarching principle for training and development is that employees are talented "resources" who must be invested in and cultivated through continuous learning. Therefore, it is important that you broadly advertise the availability of these funds and the mechanism in place to request use of the funds to all of your eligible staff employees<sup>2</sup> and that supervisors and managers allow released time so that employees may take advantage of training and development opportunities. All eligible employees must be provided the opportunity to use these funds and we would expect that the annual report<sup>3</sup> that is sent to our office at year-end would show that the funds benefited employees across all bargaining units.

It is important that you leverage training and development funds by considering UC-sponsored programs and UC Davis-sponsored programs whenever possible. It is also encouraged and expected that your units allocate departmental funds to supplement their training and development needs.

Some additional training and development suggestions that you might consider:

- UC Davis Extension Executive and Management programs, the WACUBO Business Manager Institute, the UC Management and Leadership Conference, the UC Computing Services Conference, and the UC Davis Staff Development & Professional Services courses;
- Individual, team and group training activities that support the mission(s) of your unit as well as individual career goals;
- Training for staff at all levels to support new organizational arrangements and the development of teams;
- Cooperative training efforts with other deans/vice chancellors on programs that meet your joint needs;
- New pilots and innovative arrangements with our Staff Development & Professional Services Unit; and

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<sup>1</sup> Training and development funds may be used to support travel-related costs but we ask that you assist by using departmental funds to cover high cost travel requirements so that our employees realize the benefit of these funds by the actual training received.

<sup>2</sup> All non-academic employees, with the exception of those employees in Per Diem appointments and those employees in the Senior Management Group (formerly known as the Executive Program), are eligible to receive these funds for the purpose of training and development.

<sup>3</sup> We ask that you use the template provided by our office in completing your annual report.

- Arrangements with the Staff Development & Professional Services Unit for special and cooperative programs tailored to your specific organizational needs.

Staff Development & Professional Services offers scheduled programs and courses in the areas of business and administration, career management, communication, customer service, environmental and occupational safety, human resource management, organizational development, technology education and work/life and health awareness <http://sdps.ucdavis.edu>. These topics can be customized and brought in-house to meet your unique organizational needs. To assist you, Staff Development & Professional Services provides a range of consulting services including development of learning objectives, curricula design and negotiations with external consultants.

I urge you to contact Carina Celesia Moore [ccmoore@ucdavis.edu](mailto:ccmoore@ucdavis.edu), Manager of Staff Development & Professional Services, to discuss cooperative efforts and programs that can be arranged. I also encourage you to consult with your managers, employees and training committee (if you have one in place) in the planning process of deciding how to best use these funds.

Please consider the availability of these funds an opportunity to address your most important staff education and training issues. Consider the impact that the potential budget situation may have on department workload and take the opportunity to use these funds strategically now.

If you have any questions please call Linda Fairfield (752-3954) or me (754-7249).

Robert Murta  
Executive Director—Human Resources

Cc: «HRCMember», Dennis Shimek, Linda Fairfield, Carina Celesia Moore