

The Illusion of Opportunity: Reimbursement Policies and the Academic Librarian

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abstract: For many academic librarians, as previous research has shown, the process of seeking reimbursement for professional development costs is complicated and fraught. A 2023 survey of academic librarians in the United States reveals that the transparency and complexity of reimbursement practices at academic institutions varies widely. This article draws on the public policy concept of “administrative burden” to argue that reimbursement practices for academic librarians reproduce existing social inequities through their imposition of financial, learning, psychological, and compliance costs. To be more inclusive of all librarians, academic libraries should examine and revise reimbursement policies and processes.

Introduction

As academic librarians in the United States, the authors are intimately familiar with the painful process of requesting and receiving reimbursement for attending professional development events or completing professional service and scholarship. While a previous paper looked at the general financial inequity inherent in professional development practices for academic librarians, one pain point that surfaced frequently in the study was reimbursement as a culture within academic institutions.¹ In this previous research, and in our own personal experiences as academic librarians, the authors noted issues with the lack of transparency surrounding the reimbursement process (what is or is not covered for reimbursement, knowledge of budgets for reimbursement, and even the act of submitting the paperwork) that could lead to inequities for those pursuing professional development, service, and scholarship in academic libraries.

In spring 2023, the authors sent out a new survey to academic librarians in the United States with the goal of answering the following questions:

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- How does transparency surrounding reimbursement culture for professional engagement for academic librarians in the US vary across institutions?
- What effects on equity and accessibility of professional engagement funding does this level of transparency have?

This article presents the results of this survey, which detail the harmful effects of reimbursement culture, according to survey participants, and includes recommendations for the future of reimbursement culture at academic institutions in the United States. By publishing this research, the authors hope to promote greater transparency within reimbursement culture and contribute to the abolishment of reimbursement culture itself.

This article uses the term “professional engagement” to indicate professional development, scholarship, and service opportunities for academic librarians. Additionally, “reimbursement culture” refers to academic institutions’ normalization of reimbursement policies to offset professional engagement costs to the institution. Although broader systems around promotion and tenure and funding for professional engagement are implicated in reimbursement culture, this article focuses specifically on reimbursement policies and practices.

Literature Review

When investigating research on transparency in reimbursement culture for academic librarian professional engagement, the authors noted a distinct lack of literature on the topic. The review was broadened to include literature on the importance of professional development for academic faculty (meaning non-library faculty—tenure-track and non-tenure track—whose primary role is either instructional or research-focused) and the sparse literature on reimbursement culture for academic faculty.

Professional development resources contribute significantly to retaining motivated and successful faculty and are thus key to the continued success of higher education.² However, while many academic institutions offer in-house faculty development programs, the success of these programs relies on buy-in from institutional administrators and faculty, and some authors caution against creating this type of one-size-fits-all approach to professional development.³ Moreover, a majority of professional development resources and opportunities are focused on tenure-track faculty, while non-tenure track faculty, who comprise 70 percent of faculty in the United States, and faculty who have already earned tenure are neglected.⁴

For tenure-track faculty or other early-career faculty who wish to achieve tenure or promotion, professional engagement opportunities such as conferences, workshops, and other meetings are vital, yet expensive registration fees and travel costs to attend these meetings necessitate funding support.⁵ Seventy-four percent of participants in a study on early-career faculty travel support indicated that they decided not to attend one or more professional meetings during the past two years because of the cost, despite the importance of these meetings to advancing their careers.⁶ Similarly, the authors’ own previous study of academic librarians showed that 86 percent of respondents had abstained from professional engagement opportunities due to cost. Additionally, service work through professional organizations is often a criterion for promotion and/



or tenure for academic librarians, yet individuals are often required to pay dues out of their personal funds in order to complete this service work.⁷

While some academic institutions offer faculty (including librarians) professional engagement funds, it is common for institutions to require faculty and librarians traveling to attend professional engagement activities to pay their travel costs in advance and receive reimbursement after attending the event.⁸ In this way, academic faculty and librarians are essentially forced to give their institutions a loan—often thousands of dollars—for up to several months.⁹ Although they studied reimbursement following librarian job interviews, Tarida Anantachai, et al. found that 75 percent of interviewees had to pay at least some costs up front, and 40 percent were either partially or not reimbursed. For those who were, 45 percent were reimbursed more than a month following the interview.¹⁰ Librarians and academic faculty who do not have the means to offset thousands of dollars while waiting for reimbursement miss out on opportunities available to those with the financial capital to do so, reinforcing elitism within academic institutions and further disadvantaging those from minority and/or working class backgrounds.¹¹ One study reports that 23 percent of early-career faculty could not travel for professional engagement without up-front funding, while 50 percent indicated that waiting for reimbursement would put them in a difficult financial situation.¹² From an equity perspective, reimbursement culture favors the career advancement of white, financially stable faculty and librarians. Peace Ossom-Williamson, et al. strongly believe in abolishing reimbursement culture in libraries. They ask, “If Black people have less wealth or resources and higher levels of student loan debt, why have institutions not moved toward equity to abolish reimbursements to address an existing harm?”¹³

These inequities emerge from institutional policies, and as such, have led the authors to consider the public policy concept of “administrative burden,” which describes interactions between individuals and the state. In this article, the term is used to consider the interactions between individual academic librarians and the institutions that employ them. Donald Moynihan, Pamela Herd, and Hope Harvey define administrative burden as the “costs that citizens experience in their interactions with government.”¹⁴ More specifically, Moynihan, Herd, and Harvey outline three distinct but overlapping forms of costs: “the costs that people encounter when they search for information about public services (learning costs), comply with rules and requirements (compliance costs), and experience the stresses, loss of autonomy, or stigma that come from such encounters (psychological costs).”¹⁵ Although the administrative burdens Moynihan, Herd, and Harvey describe are often much more consequential, dealing as they do with issues like healthcare and welfare, this concept accurately describes what academic librarians who are attempting to access professional engagement funds or who seek reimbursement for interviews encounter. Administrative burden as a concept also aids in understanding reimbursement policies for professional engagement in academic

There are costs to the ways academic institutions handle professional engagement and reimbursement; academic librarians bear those costs, which are not evenly distributed; and the policies that lead to these costs can be changed.



libraries.¹⁶ Moynihan, Herd, and Harvey argue that administrative burdens are consequential (they affect people), distributive (they affect some people more than others), and are constructed (and therefore changeable). That is, there are costs to the ways academic institutions handle professional engagement and reimbursement; academic librarians bear those costs, which are not evenly distributed; and the policies that lead to these costs can be changed.

Methods

The target population for this survey was academic librarians working in the United States and engaged in professional activities that may require institutional funding support (see Appendix A). Given this, the authors focused their recruitment efforts on listservs, forums, and other electronic communities that this audience tends to participate in. They distributed a link to an electronic Qualtrics survey via ALA (American Library Association) Connect forums, including those for the Association of College and Research Libraries (ACRL), ACRL Community and Junior Colleges Section, ACRL University Libraries Section, ACRL Digital Scholarship Section, ALA Core, and others; other library-related email listservs such as Digital Humanities Summer Institute (DHSI) and Digital Library Federation (DLF); and Discord servers like Connecting Librarians. The link was set up to allow for anonymous submission, meaning that IP addresses were not logged, and there was no way to identify which source participants accessed the survey from. While these lists are common vehicles for reaching the academic librarian community, they present study limitations because the distribution is focused on venues that the authors have easy access to and may lead to snowball sampling. However, the distribution reached a wide audience of academic librarians from a variety of institution types and geographic locations. If respondents indicated that they were not employed at an institution in the US, they were excluded from the study. Outside of the initial consent form, no survey questions were required and some questions allowed respondents to select multiple answers. This resulted in different n values for each question. Quantitative data was analyzed using descriptive analysis.

The authors analyzed the qualitative data using a grounded theory approach. Initially, each author was assigned two to three questions to review, which enabled them to identify common themes. From these themes a preliminary codebook was developed and the survey responses were coded accordingly. Multiple codes were applied to answers as appropriate. After the initial coding was complete, the authors traded questions to review, further refined the codebooks, and collaborated to reconcile any differences in code definitions and/or coding as needed. Responses received up to five codes, in order to capture all the themes present. Given the number of codes applied to answers, and the fact that there was not a priority order in which the codes were applied, the authors determined that using an interrater reliability test would not be effective as agreement on code definitions, and the application of the codes, was reached during the analysis phase.



Results

Descriptive Data

The survey was conducted in Qualtrics from April 11, 2023, through May 5, 2023, and received 628 responses. Of those, 98 percent ($n=615$) indicated that they were currently a librarian at an academic institution in the United States and were thus able to complete the rest of the survey. The survey used an open-ended question to ask respondents to self-describe their gender and racial backgrounds. Sixty-three percent identified as female, 10 percent identified as male, and 24 percent did not answer. Each of the following identities received 2 percent or fewer of the total responses: non-binary, genderqueer, or genderfluid. The majority of respondents (66 percent) identified as white and 24 percent did not provide a racial background. Each of the following racial backgrounds made up 3 percent or fewer of the total responses: multiracial, Latinx, Black, Asian, Hispanic, or Native American. This study population is more diverse than the US Bureau of Labor Statistics data reports on employment in libraries and archives employees; that dataset shows that the profession is comprised of 77.1 percent females and 82.5 percent people identified as white.¹⁷

Respondents by Type of Institution

Over half of respondents (56 percent, $n=344$) worked at research universities, while a little under a quarter (23 percent, $n=140$) were from comprehensive colleges. Community college librarians (14 percent, $n=84$), four-year undergraduate college librarians (7 percent, $n=46$), and special focus four-year librarians (0.6 percent, $n=4$) made up the rest (see Figure 1). Of the research university, four-year undergraduate college, special focus four-year college, and comprehensive college librarians ($n=520$), 67 percent worked at institutions classified as large (at least 10,000 enrolled), while the community college librarians ($n=81$) were more evenly split, with 31 percent ($n=25$) at medium-sized institutions (2,000–4,999 enrolled) and 33 percent ($n=27$) at very large institutions (at least 10,000 enrolled). Sixty-nine percent of respondents ($n=612$) worked for public institutions, 30 percent for private institutions, and under 1 percent (only 3 respondents) worked at for-profit institutions. Nearly half (48%, $n=294$) were in urban settings, 36 percent ($n=218$) in suburban settings, 15 percent ($n=91$) in rural settings, and just over 1 percent ($n=7$) worked at a purely online institution.

Respondent Position Details

Forty-two percent ($n=258$) of survey respondents were classified as tenure-track faculty, 30 percent ($n=184$) as staff, 24 percent ($n=145$) as non-tenure-track faculty, 3 percent ($n=18$) as academic staff, and under 1 percent ($n=3$) as administrators (see Figure 2). Fifty-four percent ($n=331$) of respondents worked primarily in person, 42 percent ($n=256$) were in hybrid positions, and 4 percent ($n=23$) worked primarily online. Sixty-five percent ($n=391$) of respondents reported that they were not represented by a union at their institution. The survey asked a series of questions about promotion and/or tenure documentation and requirements, all of which received a different number of responses resulting in different n values. The vast majority (77 percent, $n=471$) of respondents' institutions had

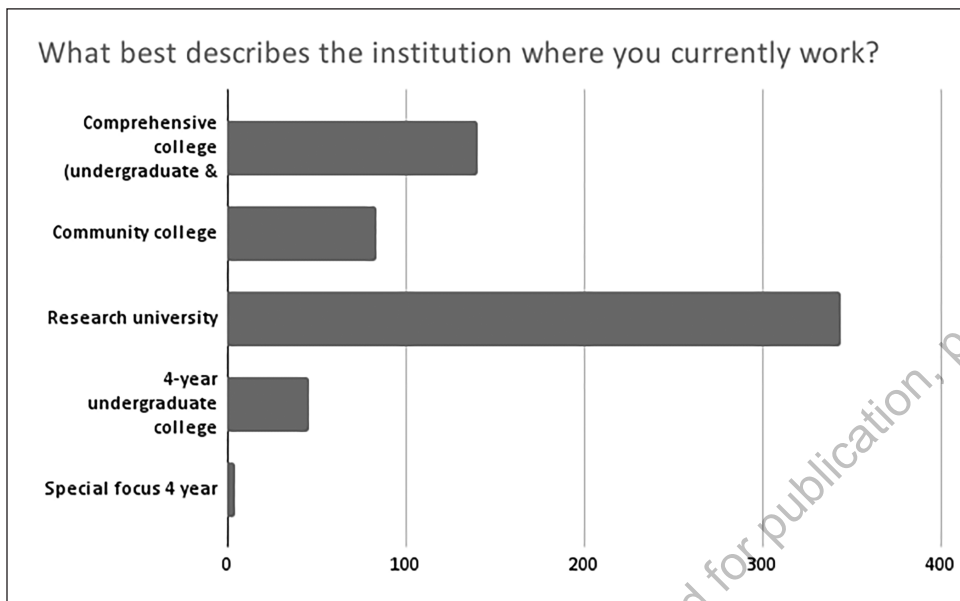


Figure 1. Survey respondents by type of institution.

a documented promotion and/or tenure system for librarians, and 97 percent (n=452) indicated that librarian promotion or tenure was contingent upon professional engagement. While the requirements regarding professional engagement were documented for 96 percent (n=426) of respondents, 41 percent (n=174) of these found the requirements to be unclear (see Figure 3).

Institutional Reimbursement Processes

When asked how payment for expenses related to professional engagement worked at their institution, 535 respondents provided 1,212 responses. Respondents were able to choose from the following options to answer this question, and participants who chose the "other" response were given a textbox to clarify their response:

- My library pays for pre-event (e.g. airfare, registration) expenses before the event
- I pay for pre-event expenses (e.g. airfare, registration) before the event and the reimbursement process starts before the event
- I pay for pre-event expenses (e.g. airfare, registration) before the event and the reimbursement process starts after the event
- My library provides money for expected event expenses prior to the event (e.g. paying attendees' per diem in advance or providing a card to put expenses on during the event)
- My library reimburses me for event expenses (meals, ground transportation) after the event
- Other
- Not sure

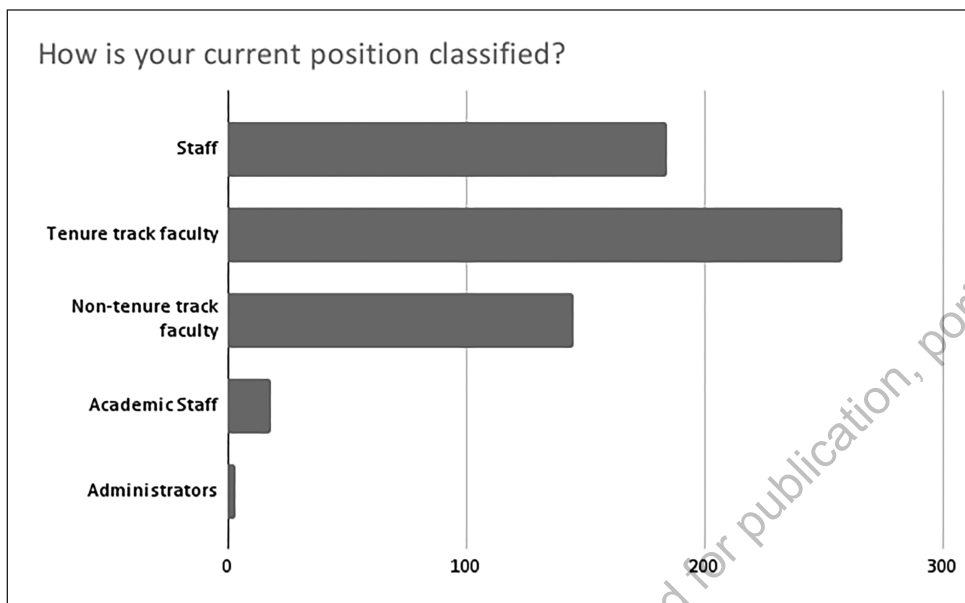


Figure 2. Survey respondents by position type.

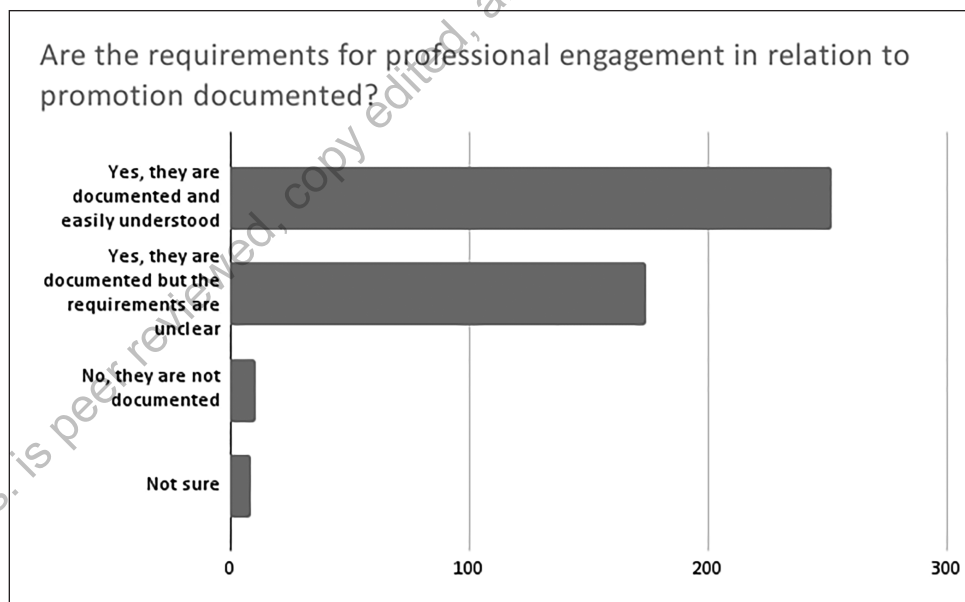


Figure 3. Reported level of institutional documentation about professional engagement requirements for promotion.

According to this question's responses, 65 percent (n=349) of librarians' institutions paid for pre-event expenses, such as flights and lodging prior to the event, and 70 percent (n=375) were reimbursed for event expenses, such as meals and ground transportation, after the event (see Figure 4). Forty-nine percent (n=260) paid pre-event expenses themselves and were reimbursed after the event took place, while 17 percent (n=91) paid for pre-event expenses themselves but were reimbursed before the event took place. Finally, 17.4 percent (n=93) are provided with money for expected event expenses, in the form of an advance per diem or an institutional travel card to use for expenses during the event, prior to the event. (see Figure 4).

When asked what they need to submit in advance of an event or other activity to receive reimbursement, 530 respondents provided 1,424 responses. Eighty-six percent (n=456) of respondents were required to submit a justification for their travel and/or expenses, 83 percent (n=442) were required to submit an anticipated budget, and 87 percent (n=463) needed their supervisor's approval. Many respondents stated that their institution always provides reimbursement for:

- conference registration (82%, n=430),
- hotels (73%, n=381),
- airfare (71%, n=370),
- mileage (56%, n=294), and
- per diem (57%, n=296).

On the other hand, 55 percent (n=277) never covered incidentals (such as a forgotten toothbrush) and 51 percent (n=257) never covered childcare (see Table 1). Opinions were divided about the ease of reimbursement: 49 percent (n=236) thought the process to receive reimbursement was easy to make sense of, while 46 percent (n=222) did not.

When asked how the reimbursement process affected their participation in professional engagement, 403 respondents provided 885 responses. Seventy-eight percent (n=316) of respondents stated that they had chosen not to attend a professional engagement event due to limits on the amount they were approved to be reimbursed for, 21 percent (n=83) had chosen to not attend this type of event due to the amount of time it

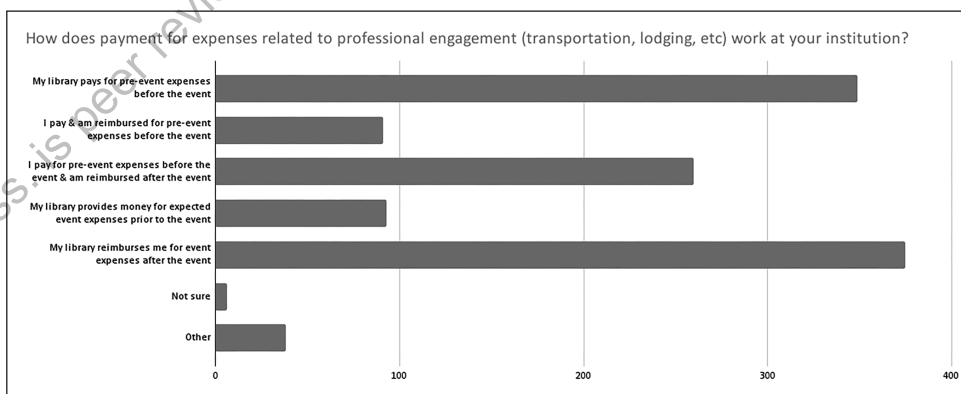


Figure 4. Reported institutional reimbursement processes.



Table 1.

Institutional coverage of professional engagement expenses, as reported by survey respondents

Expense	Always	Sometimes	Never	Unsure
Airfare	71% (n=370)	26% (n=136)	1% (n=6)	2% (n=11)
Mileage	56% (n=294)	38% (n=198)	1.5% (n=8)	4.5% (n=24)
Public Transit	54% (n=281)	29% (n=153)	3% (n=16)	14% (n=72)
Taxis	54% (n=281)	29.5% (n=154)	3% (n=15)	13.5% (n=71)
Rideshares (Lyft, Uber, etc.)	50% (n=259)	28% (n=144)	3% (n=18)	19% (n=98)
Hotels	73% (n=381)	26% (n=136)	0.8% (n=4)	0.2% (n=1)
Airbnbs (or equivalent)	29% (n=149)	19% (n=96)	8% (n=40)	44% (n=227)
Conference registration	82% (n=430)	17.5% (n=92)	0.5% (n=3)	0%
Per diem or meals	57% (n=296)	35% (n=185)	6% (n=30)	2% (n=12)
Incidentals (toothbrush, etc.)	5% (n=27)	7% (n=37)	55% (n=277)	32% (n=163)
Conference events (if they cost extra)	20% (n=103)	45% (n=232)	10% (n=53)	25% (n=128)
Accessibility aids/ equipment	7% (n=34)	3% (n=13)	6% (n=30)	85% (n=427)
Childcare	0.2% (n=1)	0.4% (n=2)	51% (n=257)	48% (n=242)
Other	27% (n=7)	38% (n=10)	23% (n=6)	12% (n=3)

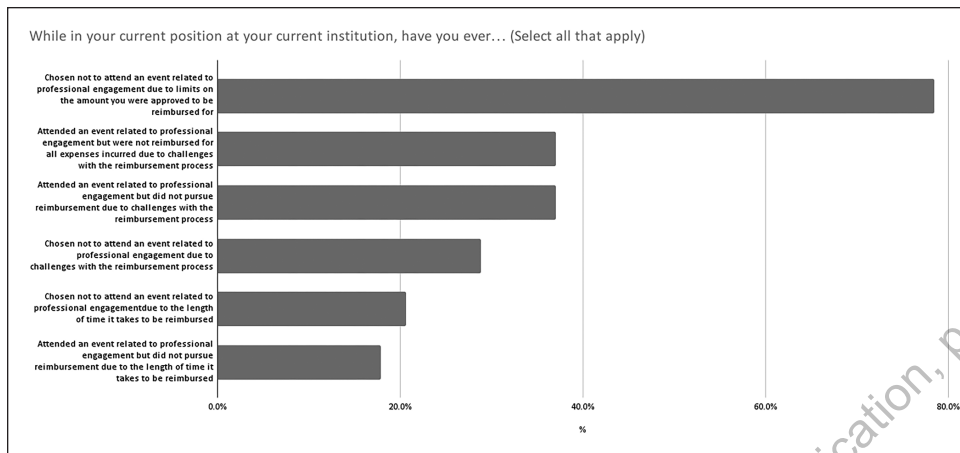


Figure 5. How institutional reimbursement processes affected survey respondents' decisions to attend professional engagement opportunities.

takes to be reimbursed, and 29 percent ($n=116$) had chosen to not attend an event due to challenges with the reimbursement process itself (see Figure 5). Additionally, some respondents who attended a professional engagement event did not pursue reimbursement due to challenges with the reimbursement process (37 percent, $n=149$) or the length of time required to be reimbursed (18 percent, $n=72$). Thirty-seven percent ($n=149$) attended a professional engagement event but were not reimbursed for all expenses incurred (see Figure 5). These numbers indicate significant problems with how academic libraries handle reimbursement for professional engagement activities.

Reimbursement Policies and Documentation

Reimbursement policies were documented for 84 percent ($n=392$) of respondents' institutions. Of these, 24 percent ($n=95$) were only able to access some of the documentation, and 2 percent ($n=8$) could not access it at all (see Figure 6). Most respondents found out about the policies via their supervisors (62 percent, $n=384$) or by talking to colleagues (64 percent, $n=395$). Seventy-three percent ($n=390$) were not sure if the reimbursement documentation or forms were accessible for people with disabilities.

Largely, respondents stated that policies for reimbursement at their institutions only change occasionally (32 percent, $n=166$) or rarely (35 percent, $n=183$). Thirty-six percent ($n=189$) stated that these policies were different for librarians than they were for other

The differences between librarians and other college or university employees, and even among library employees, point to possible inequities in reimbursement policies and practices.

faculty or staff at their institution, but 48 percent ($n=257$) believed that these policies were applied consistently for all within the library. The differences between librarians and other college or university employees, and even among library employees, point to possible inequities in reimbursement policies and practices.

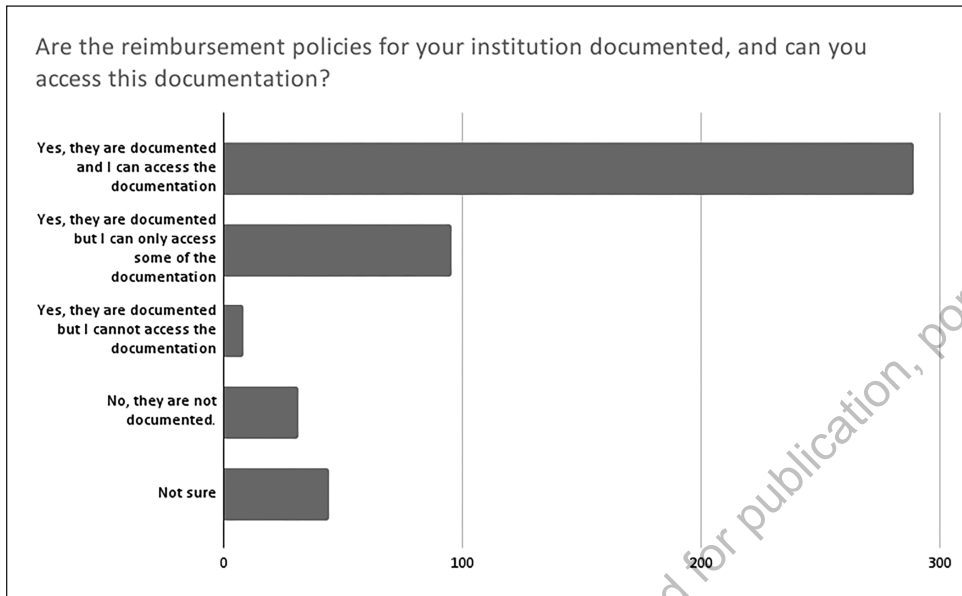


Figure 6. Reported accessibility of reimbursement policies and associated documentation.

Qualitative Data

The Reimbursement Process

The survey asked seven questions with open-ended responses (see Appendix B for additional details). The first open-ended question asked individuals to describe the steps involved in getting reimbursed for expenses related to professional engagement at their institution. Five hundred and four survey respondents answered this question. The most common responses to this question were as follows:

- Expense reports are required (71 percent).
- Professional development authorization is required (63 percent).
- All expenses are paid out of personal accounts and must be reimbursed (50 percent).
- Up-front expenses (flights, lodging) are covered but the remainder must be reimbursed (26 percent).
- All expenses are paid via institutional credit card or other payment, and no reimbursement is required (15 percent).
- Respondents have a set professional engagement budget that they cannot exceed each year (15 percent).
- Respondents are not reimbursed for all expenses incurred from professional development events: their institution won't cover certain expenses (often food), their set budget allocated is not typically enough to cover all expenses, or only a certain percentage of their expenses is reimbursed (7 percent).
- There is a wait of four or more weeks to receive reimbursement funds requesting reimbursement (9 percent).



- There are no funds for professional engagement and, as such, no professional engagement is reimbursed (2 percent).

How Funding is Approved

The authors asked respondents to “please describe how funding is approved for professional development, scholarship, and service expenses.” This question drew 499 responses. Common responses included:

- There is a set amount of funding available (34 percent).
- Funding is approved by library or university administrators (49 percent).
- Funding is approved by respondents’ supervisors (34 percent).
- Funding is approved by a committee, such as the library faculty, university faculty, or union members (13 percent).
- Standardized documentation or an online system must be used to receive funding (24 percent).
- Approval of funding is contingent on demonstrating relevance to the individual, library, or institution (7 percent).
- Approval of funding is contingent on the rank of the requester (10 percent).
- Approval of funding is contingent on the requester presenting at the event (5 percent).
- The process is unclear (5 percent).
- The process changed for the worse recently, often due to the COVID-19 pandemic (3 percent).

Reimbursement Process Clarity

Another open-ended question, answered by 214, asked respondents to “please explain what isn’t easy to make sense of about the process for reimbursement at your institution.” The most common responses were:

- Processes for reimbursement (whether approval of or submission for) are not clear (45 percent).
- The forms or software used in the reimbursement process are difficult to navigate or hard to understand (44 percent).
- Procedures are overly complicated, documentation required is burdensome, and/or the wait for reimbursement is lengthy (21 percent)
- There are inconsistencies in what was covered, whether that is a general lack of clarity or a result of where the funding comes from (14 percent).

Travel Disruptions

The fifth open-ended question asked respondents, “How are travel disruptions (flight problems, illness, etc.) handled at your institution? Please include any issues or concerns with reimbursement in your response.” This question received 411 responses. Most respondents (70 percent) were unsure what would happen in this instance. Seventeen percent shared that all costs were covered. Six percent stated that no extra costs were covered and they may in fact have to pay back the institution, either through forfeiting



professional development funds or making direct payment. A handful of other answers detailed additional limitations on expense reimbursement or other compensation when travel disruptions occurred.

Undocumented Reimbursement Procedures

When asked whether their institution had “any unwritten rules or undocumented norms” they had to follow in order to receive reimbursement, 295 survey respondents provided answers. They were also asked to explain how they learned about the “unwritten rules.” Common responses included:

- There are necessary but undocumented steps at some point in the reimbursement process (27 percent).
- There are inconsistencies in what is or is not covered by the professional engagement budget (21 percent).
- Certain expenses are covered without the documentation stating so (11 percent).
- Certain undocumented procedures are learned by word of mouth among colleagues (13 percent)
- Certain undocumented procedures are conveyed by supervisors (8 percent).
- Certain undocumented procedures are communicated by office staff (9 percent).
- Reimbursement is easier if you know the right person to smooth the process along, such as an office staff person, supervisor, dean, or similar (4 percent).
- There are not any undocumented procedures that the respondent is aware of (23 percent).
- There is uncertainty about whether there are any undocumented procedures (10 percent).
- Procedures are entirely undocumented (1 percent).

Other comments

The question “What would you like to tell us about reimbursement at your institution that we haven’t asked?” elicited 215 responses. Twenty-seven percent (n=58) found reimbursement a difficult or frustrating process. Twenty-three percent (n=49) noted that the process of having to pay upfront and wait for reimbursement was itself inequitable and left people who could not afford to do that behind. Fifteen percent (n=33) expressed a positive sentiment regarding reimbursement. Still others noted that they had access to limited funds, which often did not cover all expenses (13 percent), that they never received full reimbursement for expenses (5 percent), that it took several weeks or months to be reimbursed (7 percent), or that they received no funding whatsoever (6 percent).

Accessibility

When asked whether the reimbursement process was accessible, 224 respondents answered. Sixty-three percent (n=141) were unsure, but 83 did include comments about accessibility. Although this survey question was intended to evaluate whether the reimbursement process was accessible to individuals with disabilities, respondents interpreted “accessibility” in a variety of ways. Just over half (n=45) of the 83 respondents indicated

that, while they were not sure if the process was accessible, it felt “cognitively stressful.” Thirty-four percent (n=28) reiterated that it was unclear and 14 percent (n=12) that it was financially inaccessible (in terms of having to wait for reimbursement), while 24 percent (n=20) indicated that the reimbursement process did actually seem inaccessible for those with disabilities, and 10 percent (n=8) noted that actual paper forms or receipts were required. A few respondents commented that there was help available (5 percent, n=4), or that there was no help available (4 percent, n=3). While the survey does not reveal whether reimbursement processes are inaccessible to individuals with disabilities, the responses to this question reveal respondents’ frustration.

Discussion

Reimbursement Process Transparency

The first part of the study’s research question was, “How does transparency surrounding reimbursement culture for professional engagement for academic librarians in the US vary across institutions?” As established in the Results section of this paper, most respondents reported that they must be reimbursed for some portion of their professional engagement costs rather than the institution bearing the burden of the up-front costs. Half report that they pay out of pocket for all expenses related to professional engagement and must be reimbursed for these.

Nearly half of respondents did not find the reimbursement process easy to make sense of nor were they clear on how to get approval for and/or submit for reimbursement, while about a quarter could not access all of their library’s reimbursement documentation. One of the largest themes around reimbursement documentation was a lack thereof: one respondent mentioned, “There is no documented process, so I’ve been currently asking around to find out how to keep records in a way that I will be reimbursed.” Respondents noted that knowing the right person to ask was crucial to the reimbursement process at their institutions. As one explained, “I rely heavily

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on experienced secretaries and accounts payable staff to navigate the process and fill in the missing gaps,” while another stated, “No one wrote down directions--you have to ask somebody who’s in the know.”

When documentation did exist, it was often reported to be inconsistent or unclear, leading to confusion and extra time and effort spent to receive reimbursement. Respondents mentioned feeling that “every time I go to a conference, the rules change” or that “travel policies contradict themselves,” while others found that their requests were always “sent back for an amendment or correction,” and they were not sure “what will be approved, who I need to talk to, or how long it will take to get money back.”

The forms and software used in the reimbursement process were a large reason for this lack of clarity—44 percent of respondents found these difficult to use. Several respondents called out the number of forms required to fill out for reimbursement: “There are



multiple forms, the process... changes all the time. Reimbursement gets turned down often." Additionally, respondents continually emphasized how burdensome the software their institutions use for reimbursement is. One respondent described reimbursement software as "cognitively stressful," another called the process "difficult, specific, and drawn out," and another stated that the software is "unnavigable with the seeming intent of making you give up." This leads, as a respondent said, to reimbursement requiring "most of the heavy lifting to be done by the employee," and it is especially unfriendly to new hires—another respondent mentioned that "someone experienced always has to help new librarians several times before it makes sense to them."

To reinforce this, nearly three quarters of respondents did not know if reimbursement documentation or software was accessible for people with disabilities, and, when asked about this, reaffirmed the burdensome nature of these. Comments included that the documentation was "difficult for me to navigate as a sighted person. I don't know how much more tedious it might be for a person with limited or no vision. The system is NOT intuitive." As one respondent stated, "I am not disabled and [the software] confuses the crap out of me," while another confirmed that "the whole process is rather tedious generally and that is generally a deterrent for many."

These responses resonated with five of the six themes Anantachai, et al. identify as associated with reimbursement for academic librarian interviews: lack of communication or guidelines, reimbursement system issues, unexpected costs, onus on candidates, and contingent policies.¹⁸ More broadly, both of these themes and those identified in this survey track with Moynihan, Herd, and Harvey's definitions of the learning, psychological, and compliance costs of administrative burden.¹⁹ Librarians must learn, and frequently re-learn, how to access reimbursement, and how to comply with processes, forms, and software that might be opaque or unintuitive and require time and effort. Respondents' comments frequently conveyed frustration and stress, indicating the psychological cost of administrative burden. In an effort to avoid these costs, some librarians decide not to pursue reimbursement, and, by extension, professional engagement.

Several respondents commented on differences in how position type affected their reimbursement process.

Institution and Position Type

Although a variety of institution types were represented in the results, the majority were large public research universities in an urban setting. The variance between reimbursement transparency and institution type was surprisingly large: 35 percent of respondents at four-year colleges did not think the reimbursement process at their institution was easy to make sense of, in contrast to 40 percent at research universities, 45 percent at comprehensive colleges, and a whopping 58 percent at community colleges. A common frustration expressed by community college respondents was a single person acting as a bottleneck in the process. One respondent stated that only "one person in the budget office can figure it out and get it to work. No one else. We are dependent on her to get everything submitted." Another explained that "the procurement staff member acts as a gatekeeper, slowing down requests, making things extra complicated. She regularly sends forms back rather than improving the forms/process."

The respondents' positions were more evenly distributed, with almost all classifying themselves as either tenure-track faculty (42 percent), staff (30 percent), or non-tenure-track faculty (24 percent). Nearly 43 percent of tenure-track faculty librarians found the reimbursement process easy to make sense of, in contrast to 42 percent of non-tenure-track faculty and 40 percent of staff. Although the number of librarians who had difficulty understanding the reimbursement process did not vary meaningfully by position type, several respondents commented on differences in how position type affected their reimbursement process, including differences in reimbursement amounts for different position types. A respondent noted that they had "had trouble getting mileage reimbursements for library staff which seems unfair," while another expressed frustration that "tenured and tenure track librarians have more generous travel funding because it is part of the evaluative process." Another was "unclear whether professional staff can use the professional development budget librarians can use." This disparity in funding allocation by position type, although not uncommon, was keenly felt by those whose position type did not benefit from superior funding.²⁰

Transparency and Professional Engagement Funding Equity and Accessibility

The second part of the study's research question asked how transparency around reimbursement policies affected equity and accessibility of said professional engagement funding. There is a large gap between the real cost of attending professional engagement

“There has always been an explicit assumption that librarians should pay a portion of their professional development expenses out of pocket, so that they have ‘skin in the game.’ Many of us don’t find this reasonable.”

and what is covered through stated reimbursement policies. As one respondent stated, “There has always been an explicit assumption that librarians should pay a portion of their professional development expenses out of pocket, so that they have ‘skin in the game.’ Many of us don’t find this reasonable.” The major themes that emerged from this line of questioning include a lack of reimbursement for travel incidentals (including food!), not all expenses being reimbursable by professional development funds, and lack of coverage for extra costs incurred due to travel disruptions.

Breaking this down, as mentioned in the Results, 45 percent of respondents were not reimbursed for travel “incidentals” such as food, mileage, or taxis, and 42 percent were not reimbursed for childcare expenses incurred. Many respondents reported being questioned by their business services staff as to the veracity of their reimbursement requests: “The accounting office is always second guessing the forms, documentation, and need for costs incurred. I have yet to get reimbursed for something without a call or email asking if I have a different receipt showing single rate occupancy for the hotel (which they don’t do anymore), or something like that.” Comments specifically emphasized the confusing nature of per diem reimbursements (if these exist): “Some people were getting reimbursed for per diem expenses. I never did because I was told orally by my supervisor not to. Then I started to do it when I found out others did.” For others, “there are specific circumstances in which meals or transportation are reimbursed, but



those instructions are not included on the form you have to submit." Another found out "that my hotel and food won't be covered for events less than 100 miles from home." Returning to Moynihan, Herd, and Harvey, these experiences reveal the psychological and compliance costs of reimbursement culture's administrative burden.

To compound this gap in funding, 37 respondents were not reimbursed for all expenses incurred from professional development events—their institutions' reimbursement policies explicitly state that they will not cover certain guaranteed expenses, such as "airfare and lodging and meals"—and 33 respondents reported discovering unreimbursable expenses that documentation had not stated were uncovered, such as "particular states in the US we are not allowed to seek reimbursement for traveling to." Some respondents could only submit reimbursements over a specific amount: "After we return from travel, we submit receipts (only for expenses over \$50) into a computerized interface. The expenses that are not covered are food and drink." Others stated that "the funds allocated are not enough to cover all travel expenses," leading to situations where "hotel rates may be reimbursed up to an approved amount, otherwise event participants must pay for the remainder." Finally, several respondents mentioned reimbursement percentages based on institutional role or role at the event: "Reimbursement percentage varies by role at conference varying from 40 percent for attending to 90 percent for presenting. Probationary faculty get an additional 10 percent of funding." These gaps in funding mean that many librarians are paying out-of-pocket for professional development, which compounds existing socioeconomic inequities.

Finally, the authors discovered a disturbing trend around extra costs incurred due to travel disruptions: 25 respondents stated that these were not covered. Respondents explained that "since we receive a flat amount of funding, if disruptions result in additional expenses... that usually comes out of pocket," and "if there is a [travel] issue, we are blamed." One respondent never "got reimbursed for the flight I booked that got canceled due to the pandemic. I still have the credit, but I had to eat the cost," while another wrote that "if we can't attend an event we have prepaid due to illness or travel disruption, we are responsible for the cost. There is no reimbursement unless we actually attend." Some have "refunded the institution as well—written them a check" for travel disruptions. Given that travel disruptions are generally not within anyone's control, it is disheartening that individual librarians frequently bear the costs.

When considering the accessibility of professional engagement funding, many respondents reported almost complete inaccessibility of their funds: as one respondent stated, "We all pass around copies of successful reimbursements to try and copy... Most of us gave up on getting food reimbursed years ago." The ways that this plays out in practice include the need "to apply nearly a year in advance" for reimbursement before an event, conference funding only allocated for " untenured academic librarians" who "present (not attend)" at these conferences, and budgets that are "insufficient for most conferences, in-state or out-of-state," to the extent that "if you want to be active professionally you have to pay for most of it yourself."

Two other major themes emerged on this topic: the time and energy—the learning, psychological, and compliance costs—required to get reimbursed. This reimbursement stress caused respondents either not to pursue professional engagement or not to seek reimbursement. Due to the nature of reimbursement, most respondents "cannot submit for reimbursement till [they] return from said trip." However, many respondents



This reimbursement stress caused respondents either not to pursue professional engagement or not to seek reimbursement.

regularly experienced a wait of four or more weeks to receive their reimbursement funds after submitting the request. As a result, some respondents reported being “out of pocket for professional development expenses for 6 months or longer,” which leads to respondents “carrying thousands of dollars on my credit card, waiting to be reimbursed” despite the fact that their institutions “do not reimburse

any fees you incur on the debt.” The costs of pursuing reimbursement for professional engagement are not just experiencing administrative burden, but also financial burden.

Because of the amount of stress respondents experienced as a result of the time and energy needed to receive reimbursement successfully, respondents described “deciding against training because I didn’t want to go through the hassle of submitting the request,” or “choosing not to engage in certain professional development activities” because of “how slow this process is and how faculty may have to wait months for reimbursement after incurring high expenses for professional development activities.” Others attend professional engagement but “choose to pay on my own dime so that I don’t have to go through the process.” As one respondent stated, “it’s easier to just pay for it by myself, although I am highly aware that most people don’t have that luxury.” The administrative burden of reimbursement leads many librarians to give up on professional engagement.

Several respondents described needing to know the correct person in order to get their reimbursement approved, which involves spending energy on cultivating the relationships required for successful reimbursement, yet another cost imposed by administrative burden. This person could be the dean (“if the dean likes you, and if the department head listens to the dean, you are more likely to be reimbursed and to be approved for PD”) or an administrative staff person (“for a while, you had to be one of the favorites of the Instruction Office secretary to experience a smooth process without multiple resubmission of forms, denials, etc.”). This heightens inequities, as librarians with the time and ability to cultivate relationships benefit from them, while others do not.

Implications

This study indicates that there are two primary ways in which reimbursement practices negatively impact employees: financially and through administrative burden. Full reimbursement for professional engagement activities is far from guaranteed. The survey received a surprising number of responses indicating that necessities, such as food, were not covered. Many reported that only a certain percentage of overall expenses would be covered, or a certain amount that was not close to the total cost. Others had to carry expenses on a credit card long enough that unreimbursable interest accrued, or institutions classified the reimbursement payment in such a way as to make it taxable. Furthermore, hardly any institution covers the membership fees for professional organizations, and few take into account the extra costs caregivers may face. All of these practices add up to create a culture of haves and have-nots in which the financially privileged can advance their careers through professional engagement activities while others are left behind. Several responses that highlight this inequity:



- “I have had to skip meals at conferences because I couldn’t afford to pay out of my own pocket. The policy of reimbursement really hurts the professional growth of those of us who have very tight budgets.”
- “A persistent challenge is that myself and my colleagues often have to use our credit cards to pay for travel expenses. Our institution does not reimburse interest fees, so we are often in the position of having to pay at least some amount out of pocket for activities that are required of us. Not cool.”
- “Lack of concrete/guaranteed fiscal support for junior faculty who are working towards meeting tenure and promotion requirements has scared off job candidates. Our institution is located in a major metro area where the cost of living is very high, leading to food and housing insecurity for new hires. They don’t want the stress of self-funding their required professional development as well, especially when they have other job offers where those expenses are covered.”
- “Economically disadvantaged people have to do so much more work for the same experiences that some people can just shell out for.”
- “As an early career librarian in a new job, I once had to ask the Dean’s office for advance funding to purchase airfare for a conference because I didn’t have enough available credit on my personal credit card to buy the ticket myself. It was taken care of for me, but I was humiliated by having to ask.”
- “I think it’s really important to note that we are expected to pay for our own memberships to things like ALA and our state library association. I’m sure that’s common but I think it’s pretty messed up. Service is a requirement for tenure and this is where most of our service comes from. Therefore it actually COSTS us money to get tenure! Wildly unethical.”
- “If you can’t afford to carry a \$500 (loan to the school I guess?) then you just don’t apply for professional development. You can see how that would create an achievement gap between the haves and the have-nots. That sucks.”

Even if a librarian is financially privileged enough to float their professional engagement costs, the administrative burden of navigating reimbursement processes may keep them from doing so.²¹ As described earlier, 32 percent of survey respondents had not pursued professional engagement due to either the long wait to receive reimbursement or issues with the process itself. Thirty-six percent engaged in professional engagement but did not seek reimbursement, bearing the cost of it themselves for the same reasons. As Moynihan, Herd, and Harvey note, “administrative burden is a venue where politics plays out.”²² Reimbursement culture in academic libraries, whether intentionally or not, disincentivizes librarians from participating in professional engagement by making them bear learning, psychological, compliance, and financial costs if they decide to pursue it. The administrative burden of reimbursement practices is consequential. Reimbursement practices affect people (as indicated in respondents’ language) and are distributive in that they affect some librarians more than others—namely lower-income librarians, who might not be able to bear additional financial costs, and early-career librarians, who might not be able to advance in their career without professional engagement. Administrative burden also results in executive function theft, as defined by Abigail Goben, by adding unnecessary responsibilities to employees already encumbered with a vast array of job duties, making it harder for them to spend their time on more impactful efforts.²³ Essen-



tially, the administrative burden has been designed to be high enough that institutions are implicitly pushing their own operating costs onto employees.

Conclusion

The authors would like to close with the words from a survey respondent, who succinctly identified how academic librarians experience the financial and administrative burdens imposed by reimbursement culture.

I just want to emphasize how inequitable the reimbursement policies can be for those of us who don't make a lot of money. Dropping that much money for a large conference and not really knowing when you'll get it back can cause financial anxiety and instability. The university should be able to front money to people or be much quicker since it is a requirement of our jobs.

Academic institutions' reliance on reimbursement culture to fund professional engagement contributes to inequities in the profession. Participating in these activities is often a requirement for employees holding librarian positions, regardless of whether they are classified as staff, non-tenure track faculty, or tenure-track faculty. At a minimum, these activities allow employees to grow their expertise and careers. For many, however, participation is also a requirement of their continued employment and/or eligibility for promotion. By shifting the financial burden to individuals, institutions are putting barriers to success in front of those who do not come from financially privileged backgrounds. By relying on reimbursement to fund professional engagement, institutions are hampering the success of the very populations that the field has expressed a desire to support—BIPOC individuals, first-generation graduates, and others whose lived experiences align with the patron bases of the libraries we work in. When considering the administrative burden of getting funding approved and then going through yet another process to actually be reimbursed, it is easy to see why people choose to forgo professional engagement activities. The administrative burden is not an intrinsic aspect of reimbursement; as Moynihan, Herd, and Harvey argue, it is constructed and therefore changeable. The authors' research has shown that academic librarians want to pursue professional engagement but are consistently stymied by policies that place significant burdens on them, draining their bank accounts and taxing them cognitively. If academic libraries want to be more inclusive and want to support those who have been historically excluded from the profession, they should work to remove the administrative burdens reimbursement culture imposes and cover all costs of professional engagement, upfront as often as possible.

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Appendix A

Survey Instrument (starting from questions all participants received after confirming eligibility)

Q3 *What best describes the institution where you currently work?*

- Community college
- 4-year undergraduate college
- Comprehensive college (undergraduate & master's programs)
- Research university
- Other

Display This Question:

If What best describes the institution where you currently work? = 4-year undergraduate college

Or What best describes the institution where you currently work? = Comprehensive college (undergraduate & master's programs)

Or What best describes the institution where you currently work? = Research university

Q4 *What is the estimated size of your current institution?*

- Very small (fewer than 1,000 enrolled)
- Small (1,000 - 3,000 enrolled)
- Medium (3,001 - 9,999 enrolled)
- Large (at least 10,000 enrolled)

Display This Question:

If What best describes the institution where you currently work? = Community college

Q5 *What is the estimated size of your institution?*

- Very small (fewer than 500 enrolled)
- Small (500 - 1,999 enrolled)
- Medium (2,000 - 4,999 enrolled)
- Large (5,000 - 9,999 enrolled)
- Very large (at least 10,000 enrolled)

Q6 *Select the description which best describes your institution:*

- Public
- Private
- For-profit



Q7 What setting best describes your current institution? (If you are at a multi-site institution, please choose the setting that best describes the location at which you work.)

- Rural
- Suburban
- Urban
- Online (if you are a remote worker, please only choose this option if your institution is based online)
- Other

Q8 How is your current position classified?

- Staff
- Tenure track faculty
- Non-tenure track faculty
- Other

Q9 Do you work primarily in-person, remote, or hybrid?

- In-person
- Remote
- Hybrid

Q10 Does your institution have a documented promotion/tenure system for librarians?

- Yes
 - No
 - Not sure
-

Display This Question:

If Does your institution have a documented promotion/tenure system for librarians? = Yes

Q11 Is librarian promotion contingent upon one or more of the following: professional development, scholarship, or service?

- Yes, this is a formal requirement
 - Yes, this is an informal requirement
 - No
 - Not sure
 - Other
-

Display This Question:

If Is librarian promotion contingent upon one or more of the following: professional development, sc... = Yes, this is a formal requirement

Or Is librarian promotion contingent upon one or more of the following: professional development, sc... = Yes, this is an informal requirement



Q12 *Are the requirements for professional development, scholarship, or service in relation to promotion documented?*

- Yes, they are documented and easily understood
- Yes, they are documented but the requirements are unclear
- No, they are not documented
- Not sure
- Other

Q13 *Are you currently represented by a union at your institution?*

- Yes
- No
- Unsure
- Other

Q14 *Please describe the steps involved in getting reimbursed for expenses related to professional development, scholarship, and service at your institution.*

Q15 *While in your current position at your current institution, have you ever... (Select all that apply)*

- Chosen not to attend an event related to professional development, scholarship, or service due to limits on the amount you were approved to be reimbursed for
- Chosen not to attend an event related to professional development, scholarship, or service due to the length of time it takes to be reimbursed
- Chosen not to attend an event related to professional development, scholarship, or service due to challenges with the reimbursement process
- Attended an event related to professional development, scholarship, or service but did not pursue reimbursement due to the length of time it takes to be reimbursed
- Attended an event related to professional development, scholarship, or service but did not pursue reimbursement due to challenges with the reimbursement process
- Attended an event related to professional development, scholarship, or service but were not reimbursed for all expenses incurred due to challenges with the reimbursement process

Q16 *At your institution, please describe how funding is approved for professional development, scholarship, and service expenses.*

Q17 *How does payment for expenses related to professional development, scholarship, and service (transportation, lodging, etc) work at your institution? (Select all that apply)*

- My library pays for pre-event (e.g. airfare, registration) expenses before the event
- I pay for pre-event expenses (e.g. airfare, registration) before the event and the reimbursement process starts before the event
- I pay for pre-event expenses (e.g. airfare, registration) before the event and the reimbursement process starts after the event

- My library provides money for expected event expenses prior to the event (e.g. paying attendee's per diem in advance or providing a card to put expenses on during the event)
- My library reimburses me for event expenses (meals, ground transportation) after the event
- Not sure
- Other

Q18 To receive reimbursement, what do you have to submit in advance of the event or other professional development activity? (Select all that apply)

- Justification for travel/expenses
- An anticipated budget
- Supervisor approval
- Not sure
- Other

Q19 Please select all expenses that are covered for reimbursement at your institution

- | | |
|--|-----------------------------|
| Airfare | ▼ Always (1) ... Unsure (4) |
| Mileage | ▼ Always (1) ... Unsure (4) |
| Public transit | ▼ Always (1) ... Unsure (4) |
| Taxis | ▼ Always (1) ... Unsure (4) |
| Rideshares (Lyft, Uber, etc.) | ▼ Always (1) ... Unsure (4) |
| Hotels | ▼ Always (1) ... Unsure (4) |
| Airbnbs (or equivalent) | ▼ Always (1) ... Unsure (4) |
| Conference registration | ▼ Always (1) ... Unsure (4) |
| Per diem or meals) | ▼ Always (1) ... Unsure (4) |
| Incidentals (toothbrush, etc.) | ▼ Always (1) ... Unsure (4) |
| Conference events (if they cost extra) | ▼ Always (1) ... Unsure (4) |
| Accessibility aids/equipment | ▼ Always (1) ... Unsure (4) |
| Childcare | ▼ Always (1) ... Unsure (4) |
| Other | ▼ Always (1) ... Unsure (4) |

Q20 Is the process for reimbursement (forms, etc.) at your institution accessible for people with disabilities?

- Yes
- No
- Not sure
- Other

Display This Question:

If Is the process for reimbursement (forms, etc.) at your institution accessible for people with dis... = No

Or Is the process for reimbursement (forms, etc.) at your institution accessible for people with dis... = Not sure



Q21 Please explain what isn't accessible about the process for reimbursement at your institution.

Q22 Is the process for reimbursement (forms, etc.) at your institution easy to make sense of?

- Yes
- No
- Not sure
- Other

Display This Question:

If Is the process for reimbursement (forms, etc.) at your institution easy to make sense of? = No

Or Is the process for reimbursement (forms, etc.) at your institution easy to make sense of?

= Not sure

Q23 Please explain what isn't easy to make sense of about the process for reimbursement at your institution.

Q24 How are travel disruptions (flight problems, illness, etc.) handled at your institution? Please include any issues or concerns with reimbursement in your response.

Q25 At your institution, how do you find out about reimbursement policies and procedures? (Select all that apply)

- During new employee on-boarding
- On a institutional website
- On an internal website
- On a form
- Via email from an institutional office
- Through my supervisor
- From asking colleagues
- Not sure
- Other

Q26 Are the reimbursement policies for your institution documented, and can you access this documentation?

- Yes, they are documented and I can access the documentation
- Yes, they are documented but I can only access some of the documentation
- Yes, they are documented but I cannot access the documentation
- No, they are not documented
- Not sure
- Other

Q27 Are there any unwritten rules or undocumented norms that you must follow to receive reimbursement? If so, what are they and how did you find out about them?

Q28 In your experience at your institution, how frequently do policies around reimbursement change?



- Very Frequently
- Frequently
- Occasionally
- Not very frequently
- Never
- Not sure
- Other

Q29 *Are policies around reimbursement consistently applied to all at your library?*

- Yes
- No
- Not sure
- Other

Q30 *Are policies different for librarians in your library than for other faculty/other professional staff at your institution?*

- Yes
- No
- Not sure
- Other

Q31 *What would you like to tell us about reimbursement at your institution that we haven't asked?*

Q32 *How do you describe your gender identity? This question is being asked to identify any potential association between gender identity and reimbursement for professional development, scholarship, or service expenses. If any results related to this question are too small to be anonymous, we will not report them.*

Q33 *How do you describe your racial background? This question is being asked to identify any potential association between race and reimbursement for professional development, scholarship, or service expenses. If any results related to this question are too small to be anonymous, we will not report them.*

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Appendix B

Codebooks

“Please describe the steps involved in getting reimbursed for expenses related to professional development, scholarship, and service at your institution.”

Code	Codebook Definition	Number of responses with this code	Representative Response
PD authorization	Get approval from higher ups to attend the PD; often involves submitting documentation and/or signatures	316 (63% of respondents)	Fill out a form, get approved, have a budget and then go.
Committee approval	PD requests/funding requests must go through a committee process (rather than simply through various admin)	22 (4% of respondents)	Submit application to professional development committee to vote to approve or not to approve travel expenses.
Grants	Must apply for grants to cover PD expenses	7 (1% of respondents)	There are several grant programs that we are encouraged to apply for, one from the college and one from the union.
Set budget	There is a set amount that librarians can be reimbursed for (overages are not reimbursed)	74 (15% of respondents)	Librarians receive an annual professional development allotment. We have to request permission from library administration to use it. For most things we have to pay out of pocket and then submit a form for reimbursement. The reimbursement is usually processed in 2–3 weeks.
No funds	No funding is available to cover PD & there is no reimbursement for expenses	9 (2% of respondents)	Ha! Step 1: There is no reimbursement. Steps 2–100: See step 1.
Out of pocket	All expenses are paid out of personal accounts	251 (50%)	We pay in advance for all conference fees, class costs, hotels, transportation, and food. After the event (could be months later), we upload pdfs/jpegs of our receipts to a complicated HR form. We are reimbursed on our next paycheck.



Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Prepayment	Ability to use institutional credit card or direct institutional payment with no need for reimbursement	78 (15% of respondents)	We each have a university credit card with our names on it. We do not have to be reimbursed at all.
Some reimbursement	Up front expenses are prepaid (but sometimes not lodging or flights) but the rest must be reimbursed (such as mileage, food, etc.)	129 (26% of respondents)	For some things, we are allowed to pay with a university credit card. For other things, we must wait to be reimbursed, sometimes for many months if we book a conference well in advance. We need to submit receipts that show how we paid to the business office. It is sometimes unclear what the business office will reimburse and what they demand to pay themselves. Rules are constantly changing.
Not all expenses covered	Institution won't cover certain expenses (i.e., food), set budget allocated is not typically enough to cover all expenses, or only a certain percentage is reimbursed	37 (7% of respondents)	Request travel funds. Submit travel reimbursement form upon return. Reimbursement percentage varies by role at conference varying from 40% for attending to 90% for presenting. Probationary faculty get an additional 10% of funding. Total reimbursement is capped to \$1500 annually.
Training required	Must attend a training before allowed to pursue reimbursement	1 (0.2% of respondents)	I mean--it is a whole rigamarole. There is a 3 hour training that I have not attended. Evidently someone at another school in my state was scamming the system and spoiled it for everyone.
Expense reports	Must submit expense reports/receipts upon return for reimbursement	359 (71% of responses)	spend personal money, save itemized receipts, upload through Concur, get multiple levels of approval, process can take several weeks

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Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Lengthy wait	Any time they mentioned 4 weeks/1 month or more to receive reimbursement committee approval	45 (9% of responses)	After approvals for reimbursement are granted, then a check arrives in the mail from university accounting services, often 6–8 weeks later. I typically am out of pocket for professional development expenses for 6 months or longer, as travel arrangements, registration, and accommodations must be completed months in advance.

“At your institution, please describe how funding is approved for professional development, scholarship, and service expenses.”

Code	Codebook Definition	Number of responses with this code	Representative Response
Set amount	Funding is a specific dollar amount or number of conferences	168 (34%)	Librarians have a set amount of professional development funding for the year. Our direct supervisors approve or deny these requests.
Admin	Library or university administrators approve funding	246 (49%)	Typically, a librarian makes a travel request and it is approved/not approved by the library dean. If the event requires out of state travel, I think the VP of Instruction and/or the President has to approve it.
Committee	Funding is approved by a committee within the university or library (e.g. library faculty or union members)	64 (13%)	Approval is first by the Division Dean. Then by a committee of faculty peers, who base approval on the relevance of the activity to pedagogy or other campus priorities.
Supervisor	Funding is approved by the respondent’s supervisor/s	170 (34%)	Supervisor and supervisor’s supervisor needs to approve.
Form	Some sort of standardized documentation is submitted; may include a budget or use of an online system	121 (24%)	It is through a pre-approval system. There is no set dollar amount per employee per year.



Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Relevance	Funding requests require evidence that the event is relevant (for the individual librarian, for the library, or for the institution)	33 (7%)	I have a set amount of personal funding at the start of a fiscal year. Anything above that amount, I have to pay out of pocket. I submit a form to my supervisor and library admin requesting to use funds and including a justification for how the library will benefit from the requested experience.
Varies by rank	Funding varies by the librarian's rank or status (e.g. tenure-line, tenured, faculty, staff)	49 (10%)	Allocated amount based on number of librarians and staff in division. Distribution is at AD's discretion, but priority is given to Assistant Librarians and those with presentation or service obligations.
Presenting	Funding varies by whether the librarian is presenting or not	25 (5%)	We submit a detailed request to our direct supervisor. If that person approves, the Associate University Librarian must also approve. The detailed request includes dates of travel, nature of the event, our role (attendee, presenter, officer, etc.), and an estimated breakdown of expenses by category (airfare, registration, taxi, etc.)
Unclear	Unclear how funding is approved	27 (5%)	There is a form to fill out (with expenses and rationale) that goes to the AUL, who then passes it on and advocates to the UL. There is no clear policy on how much you can request, or for what exactly, and while I've always been approved decisions for the most part feel arbitrary
No money	No funding is available	7 (1%)	Administration makes the decisions. We do not know the process. Last FY, the library department was given 50.00 (yes, fifty dollars) for travel/ prof development.

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Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Time-bound	Funding requests depend on timing (e.g. all requests have to be submitted by a certain date)	35 (7%)	We put in a request at the start of the fiscal year (this may increase to 2x a year to better accommodate folks) for professional development. There are also administrative funding for professional development, scholarship, and service that is expected of people because of their roles.
Union	Union is involved in funding decisions	7 (1%)	We have a Professional Development and Travel Request form. You have to submit details about the prodev / travel and estimated expenses. How the funding is reviewed and approved / denied is based on whether you're in our librarian bargaining unit or not. I am and that goes to a central committee. We are guaranteed \$300/year and can also request funds from a shared pool. For other folks it's an AUL decision.
Competition	Requests for funding are somehow competitive, either within the library or institution	5 (1%)	Before covid, we could each pick one professional development conference to attend. After covid, we have to participate in a competitive grant process so getting funds to attend anything is much harder. We do have free tuition at any of our sister schools so we only have to pay the fees. Publication fees such as OA costs are not reimbursed and we do not have an institutional plan currently. Service expenses do not get reimbursed.
Outside library	Funding is not controlled by the library	16 (3%)	There is a yearly limit per librarian. Available funds outside of library system do exist and that is helpful for supplementary.

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Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Adverse funding change	Funding or funding approval has negatively changed over time (almost always by COVID-19)	13 (3%)	My institution is currently not allocating money for professional development. Before covid, we each got one full conference paid per year (or up to 1300 a year). If there were additional funds then we could ask for more.

“Please explain what isn’t accessible about the process for reimbursement at your institution.”

Code	Codebook definition	Number of responses with this code	Representative response
Cognitively stressful	Process may or may not be accessible, but it is difficult to navigate	45	outdated excel and pdf forms, but I haven’t checked them and don’t use screen readers myself. Also the sheer cognitive load of the different moving parts, let alone how per diem is calculated part or no-rate for local travel, one-day travel and based on Univ. home town instead of interim or endpoints.
Paper	Physical forms or receipts are required	8	Paperwork has to be physically submitted to an office on campus.
Financially inaccessible	The process is financially burdensome	12	It’s not clear (or maybe supervisors don’t get adequate training) on what is and isn’t covered -- for example, when I’ve asked about whether I can get per diems covered (for something I needed to have a full funding commitment to apply to), I’ve been told “it’s not usually departmental policy but...sure!” It also assumes that you have enough money to front everything yourself, which can be daunting for longer/more expensive events.



Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Unclear process	The process is unclear	28	We are at the mercy of supervisors and administration accepting “reasonability” for professional development requests. The necessary documentation to submit a reimbursement request is also hard to identify and often best understood via word of mouth.
Inaccessible	Yes, this seems inaccessible	20	The font on the online forms is low-contrast and hard to read.
Help provided	Help is available with the process	4	The electronic submission process is complicated so the office administrator takes care of it for all librarians.
No help	No help is provided with the process	3	The Business Office staff make it impossible to have a pleasant experience. They are constantly changing the way they want documentation and it feels like they keep moving the goal posts there. Their demeanor is very condescending if a mistake is made (unbeknownst to the librarian who was just following protocol from the last successful reimbursement event)

“Please explain what isn’t easy to make sense of about the process for reimbursement at your institution.”

Code	Codebook definition	Number of responses with this code	Representative response
Unclear forms and software	The forms or software itself are hard to navigate or difficult to understand.	94 (44%)	The computer system is hard to understand and requires knowing account codes that aren’t always clear and accessible



Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Inconsistency in coverage	There is a lack of clarity on what is considered a covered/reimbursable expense or changes in what is covered depending on circumstances or funding source.	30 (14%)	It's never clear how much we will actually be reimbursed for things like hotels, and because any alcoholic drinks on a receipt will mean that meal isn't reimbursable.
Unclear processes	There is a lack of clear directions for how to get approval and/or submit for reimbursement. Also includes differences between written policies and submission forms/software. Also including challenges in getting clarity from knowledgeable personnel.	96 (45%)	Instructions can differ depending on where you look. Many receipts/invoices from library organizations do not require all the information the business office needs, so I often have to provide additional documentation such as credit card receipts.
Burdensome processes or requirements	Overly complicated procedures or cumbersome requirements for documentation. Includes lengthy waits for approval or reimbursement.	44 (21%)	There are two ways to get funding. Both of which require an inordinate amount of pre-planning (at least a year in advance). Once you get approved for funding, there is a website used to book flights, hotels, etc. and begin the reimbursement process (I think). I only attempted once and it was for reimbursement for mileage and it was so confusing and complicated, I just gave up.

“How are travel disruptions (flight problems, illness, etc.) handled at your institution? Please include any issues or concerns with reimbursement in your response.”

Code	Codebook definition	Number of responses with this code	Representative response
Not sure	Unsure	289 (70%)	
Costs covered	All costs are covered	68 (17%)	University covers non-refundable costs when attendance is not possible due to reasons beyond my control.



Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Extra costs not covered	Expenses above the original approved amount not covered	8 (2%)	It is up to the traveler to take care of any disruptions. This can cause the traveler to incur expenses beyond what will be reimbursed.
Costs covered only if booked through institution	Anything booked through the institution will be covered, but other expenses will not	6 (1%)	If you use the campus travel service the travel agent supposedly helps; if you buy tickets independently it is employee's responsibility & you are encouraged to buy travel insurance - campus agency provides that.
Costs not covered	No extra costs are covered or reimbursed and the person may have to reimburse the university for anything non-reimbursable either directly or through forfeiting PD funds	25 (6%)	I had an issue with my flight, lost the original reservation, and used my miles to get home. I was not offered anything. Usually if there is an issue, we are blamed.
Approval needed	Costs can be submitted for reimbursement, but there is no guarantee of approval.	3 (.7%)	I believe partial to full reimbursements are provided if there's a documented reason for having to cancel. We are asked to first try and cancel our reservations for a refund. If that's not possible then reimbursement is decided on a case by case basis.
Situation dependent	Personal circumstances (illness, family emergencies) are not covered while travel disruptions are	4 (1%)	Changes due to personal issues are not reimbursed. For example, I had to change a flight due to a family illness and the added cost of changing the flight was not reimbursed.
Limited extra costs covered	Cap on the amount covered above the original approved amount. This cap is often the overall PD allotment for the employee, but can be other amounts.	8 (2%)	If expenses exceed our prodev funds then its on us.

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“Are there any unwritten rules or undocumented norms that you must follow to receive reimbursement? If so, what are they and how did you find out about them?”

Code	Codebook definition	Number of responses with this code	Representative response
No	There aren't any undocumented procedures	67 (23%)	No
Unsure	Not sure whether there are undocumented procedures	29 (10%)	I don't know
All undocumented	There are no documented procedures	4 (1%)	They are only undocumented. I found out by asking my supervisor (the Dean) and colleagues mentioning things in passing.
Undocumented budget considerations	The budget is flexible or inflexible in ways that are not documented	61 (21%)	Trying to get the least expensive of everything, even if it doesn't make sense. For example, the less expensive flight is to leave at 6am - but then I have to pay out of pocket expenses to get to the airport.
Excluded expenses	Certain things are not covered but the documentation does not state so	33 (11%)	There seem to be unwritten rules about what does and doesn't qualify for reimbursement. The form says I can put in for meals but I've been told that I cannot.
Prepayment	Learned that prepayment is an undocumented option	7 (2%)	I didn't find out that I can have the financial services office pre-pay my registration for a conference with a special card they have until it was mentioned casually in another meeting and I emailed them directly to ask about it
Undocumented procedures	Undocumented steps at any point in the reimbursement process, including the preauthorization step	79 (27%)	Yes, through the library business office. Things like fields that don't need to be filled out (even though they're on the form) and attaching/including the event/conference program because they have to make sure we're not asking for any meal reimbursement when meals were provided.

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Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Constant changes	Process is always changing	6 (2%)	The issue is that the rules keep changing so much that I cannot keep up with them and then get chastised for not knowing them when I submit a new event.
Friends in high places	Can get better treatment/ easier process if you make friends with the right person (supervisor, office employee, dean, etc.)	13 (4%)	If the dean likes you, and if the department head listens to the dean, you are more likely to be reimbursed and to be approved for PD.
By making mistakes	Learned through mistakes	24 (8%)	I found out about them by making mistakes on the forms.
Word of mouth	Learned by talking with colleagues and others, excluding supervisor and office staff	39 (13%)	Every time I've wanted to get reimbursement for something, I ask colleagues for assistance.
Supervisor	Learned by talking with supervisor	23 (8%)	I just request what my supervisor says can be reimbursed.
Office staff	Learned by talking with administrative, business, or other office staff	27 (9%)	Our department secretary is amazing and knows all the rules for how to get things done. She helps a LOT!
Non-admin organization	Learned by talking with a committee, union, or other non-administrative institutionally affiliated organization	4 (1%)	Travel going through professional development travel committee is well-documented; otherwise very much word-of-mouth.
N/A		17 (6%)	N/A

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“What would you like to tell us about reimbursement at your institution that we haven’t asked?”

Code	Codebook definition	Number of responses with this code	Representative response
Inequitable	Noted that requiring people to pay and wait for reimbursement benefits people with the privilege to do so and leaves many others behind. There can also be inequities in how funding is allocated.	49 (23%)	Reimbursement does not take into account the socioeconomic background of librarians entering the field. Socioeconomic considerations are a factor for fulfilling job requirements that include: participating in service, research, and professional development.
Limited funds	PD funds are limited and do not usually cover everything.	28 (13%)	Most people aren’t active professionally because they can’t afford to be. The library doesn’t offer much funding.
Not fully reimbursed	Expenses are not fully reimbursed due to policy. Often only a percentage is.	11 (5%)	Our reimbursement is at a percentage of the expense, so even presenting at a conference typically only leads to a 60% reimbursement of expenses. It’s not broken down by what is covered or not, but by percentage. Attending a conference without presenting is significantly less, making it very expensive personally to attend conferences where you aren’t a presenter. I did negotiate some funding for professional development as part of my hiring package, so that my first few conferences were reimbursed at 100%.
Lengthy reimbursement	It takes a long time to be reimbursed (weeks to months), which can mean people are carrying balances on credit cards and accruing interest which will not be paid back.	16 (7%)	It takes FOREVER! At one point, [my institution] owed me more than \$5,000. That is absolutely ridiculous considering they have billions and I don’t. This is a social justice/equity issue, thank you for researching it.

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Appendix B, Cont.

Code	Codebook Definition	Number of responses with this code	Representative Response
Frustrating process	Or difficult process	58 (27%)	This: just this week, I had to print off redacted bits from my debit card statement to prove the last four digits of the card that I used to split a hotel room with another colleague at my institution WAS, in fact, my card. Yes. To SPLIT a hotel room.
Memberships not covered		3 (1%)	I think it's really important to note that we are expected to pay for our own memberships to things like ALA and our state library association. I'm sure that's common but I think it's pretty messed up. Service is a requirement for tenure and this is where most of our service comes from. Therefore it actually COSTS us money to get tenure! Wildly unethical.
No travel to discriminatory states		1 (.5%)	In California, we are not allowed to reimburse for travel to states with what are deemed discriminatory laws. The list is 23 states long!
No funding		12 (6%)	It was nice to have a pd budget.
Positive sentiment		33 (15%)	We are very fortunate at my institution to have very generous travel/professional development funds in the library, and we also have very helpful staff.

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Notes

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