



## Policy for Conference Attendance and Staff Training

### Central Administration Staff and Units

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#### Policy Statement

Conferences and training advance the professionalization of staff by providing valuable opportunities to keep current on various tools necessary to perform day-to-day job responsibilities, to be knowledgeable of industry standards, to learn new tips and techniques and to build an informed network of colleagues. This policy applies to multiple categories of training, such as conferences, seminars, professional development, external training by third parties, internal training by the Harvard Center for Workplace Development (CWD) and certifications, including Continuing Professional Education (CPE) credits.

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#### Reason for Policy

To provide a clear policy on both eligibility and funding for Conference Attendance and Staff Training, to facilitate consistency in following best practices across all units and departments, and to ensure costs are considered prior to approval.

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#### Who Must Comply

All Harvard Central Administration staff, departments and units regardless of funding source.

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#### Procedures

Employees should make managers aware of their interest in a training opportunity or conference throughout the fiscal year. Ideally, requests should be communicated at the beginning of the annual Performance Management Process, or PMP. This will ensure that requests are incorporated into the upcoming fiscal year budget for the department. All educational offerings must meet general criteria including, but not limited to, directly relating to a staff member's job function, advancing key priorities or the profile of the unit, and contributing to an individual's career development. In addition, those attending a conference may be asked to share what they learned with other team members when they are back in the office. In making decisions, managers may consider time in job, job performance, and rotation between members of a team to determine who is selected to attend conferences and training each fiscal year.

When pursuing training or conference offerings, remember to follow designated best practices when possible:

- Work with your local finance or administrative leader to ensure the training is within the organization's conference, training and professional development budget, which is typically developed based on per person training estimates. Travel costs with the attendance of non-local conferences and training should also be contemplated. Be aware that certain roles, such as IT roles, may have greater training needs to perform their job and as such may have a higher per person training budget.
- Pursue online options for conferences and training, including Lynda.com which has 4,000 online trainings covering Microsoft products, business skills, web design skills, and many others; Harvard ManageMentor which includes leadership and management skill development services; and Harvard's Tuition Assistance Plan which offers various University courses. Links for these options are below:
  - <http://lynda.harvard.edu/>
  - <http://harvardbusiness.org/harvard-managementor>
  - <http://hr.harvard.edu/tuition-assistance>



## CENTRAL ADMINISTRATION FINANCIAL POLICY

Responsible Office: Central Finance and Administration  
Date Effective: July, 2016

- Select internal Center for Workplace Development (CWD) training before external alternatives: <https://hr.harvard.edu/learning-development>
- Attend events at local venues to save travel expenses.
- Seek group rates for travel and registration expenses when local alternatives are not available, and take advantage of all available discounts provided by the conference/training venue. Please make sure to consider the total cost of travel expenses to determine if attending the conference/training is still a wise expenditure and within budget. Limit attendance to the same conference or training by individuals in the same department to two people or fewer. More than two attendees require an exception to be approved by the unit local VP and finance leader.
- Track who is attending conferences/training each year and monitor how frequently individuals are attending to ensure all employees have the ability to attend conferences/training.
- Consider bringing trainer(s) in-house to provide training for larger groups.
- Professional certifications should be from industry-recognized/accredited organizations and will only be covered by Harvard if they are required for an employee to perform his/her job.

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### Responsibilities and Contacts

Central Administration units and department finance and administrative leaders are responsible for ensuring all staff in Central Administration complies with this policy. Central Finance and Administration (CFA) is responsible for final approval when arbitration is needed. CFA is also responsible for reviewing the policy on an annual basis and making updates when needed.

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Note to Finance Staff: Payment for Conference Attendance and Staff Training should be coded to object code ranges S862 "Training" and S863 "Professional Development." Associated travel should be coded to the proper object codes within travel object code range M764, "Travel & Entertainment."

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### Related Resources

The University Financial Policy website: <http://policies.fad.harvard.edu/>