



acrl 2025



I Have to Pay to Keep My Job:

Examining Financial Barriers to Promotion and/or Tenure

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Drawing from data collected in 2020 and 2023 through national surveys, this paper will illuminate financial barriers faced by academic librarians in tenure-track or professional positions with a promotion requirement related to service, scholarship, or other professional engagement. Such positions often require a combination of service and scholarship in addition to fulfilling day-to-day job duties in order for librarians to be promoted or even remain employed. Service is often through national organizations that require membership fees, something that most institutions will not reimburse. Service, scholarship, and other professional commitments may require travel and all the expenses associated with it. Even when organizations do provide funding, it may not be enough to cover all the expenses incurred, require burdensome reimbursement processes, or take months for the librarian to be made whole, possibly leaving them to pay interest on debts related to work. This leaves opportunities out of reach for many librarians who cannot afford to incur such expenses, and contributes to the lack of diversity in our profession. When our systems are designed to privilege only those who can afford to participate, we leave out many of the voices we need to center.

While these are known issues, there has been little data to show just how widespread the problems are. Professional engagement—participating in professional development, scholarship, and service—has been shown to be an important element of employee retention in higher education, particularly for tenure-line faculty.¹ However, to date little research focuses on the economic aspects of pursuing professional engagement, such as funding and reimbursement policies and processes; the small amount of existing research was largely conducted prior to the COVID-19 pandemic and focuses on the minority of faculty who are tenure-line.² Academic librarians who wish to participate in professional engagement must navigate a complex landscape: these positions hold a variety of statuses across higher education institutions,³ may or may not participate in a tenure or promotion process, and may or may not be required to engage in professional development, scholarship, and service. Over the past 25 years, academic librarians have experienced growing costs for professional engagement, stagnant wages, and increasing student loan debt, all of which are exacerbated by broader racial and gender inequities.⁴ When they do pursue professional engagement, they might face hostile reimbursement

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policies.⁵ Despite these documented concerns, financial barriers to professional development access remain largely unchanged, and many academic librarians are not satisfied with existing funding for professional engagement.⁶ Many faculty report abstaining from pursuing professional engagement due to an inability to bear the various costs.⁷ The two surveys discussed in this paper, conducted in 2020 and 2023, aim to fill in the gaps in how academic librarians experience the policies and processes of accessing funding and receiving reimbursement for professional engagement.

Methods

The data cited in this paper comes from two national surveys shared with the academic librarian community through ALA connect, associated listservs, and social media in 2020 (February–May) and 2023 (April–May). Both were accessible via a Qualtrics anonymous link, meaning IP addresses were not tracked, and both required respondents to answer “Yes” to “Are you employed as a librarian at an academic institution in the United States?” in order to be included in the analysis.

Our 2020 survey had 674 respondents. For this paper, we required a survey completion rate of 55% or higher and for the question of “How is your position classified” to be answered with either non tenure-track, tenure-track, or staff to be included in data analysis. This resulted in a dataset of 558 responses. (A. Koziura, F. Bradham, and M. Seale, unpublished data, 2020 hereafter referred to as “2020 survey”)

Our 2023 survey had 634 respondents. For this paper, we required a survey completion rate of 61% or higher and for the question of “How is your current position classified” to be answered with either non tenure-track, tenure-track, or staff to be included in data analysis. This resulted in a dataset of 502 responses. (A. Koziura, F. Bradham, and M. Seale, unpublished data, 2023 hereafter referred to as “2023 survey”)

As survey participants were not required to answer any questions beyond the consent form and initial question to ensure they met the qualifying criteria, each individual question has its own n value for the number of respondents.

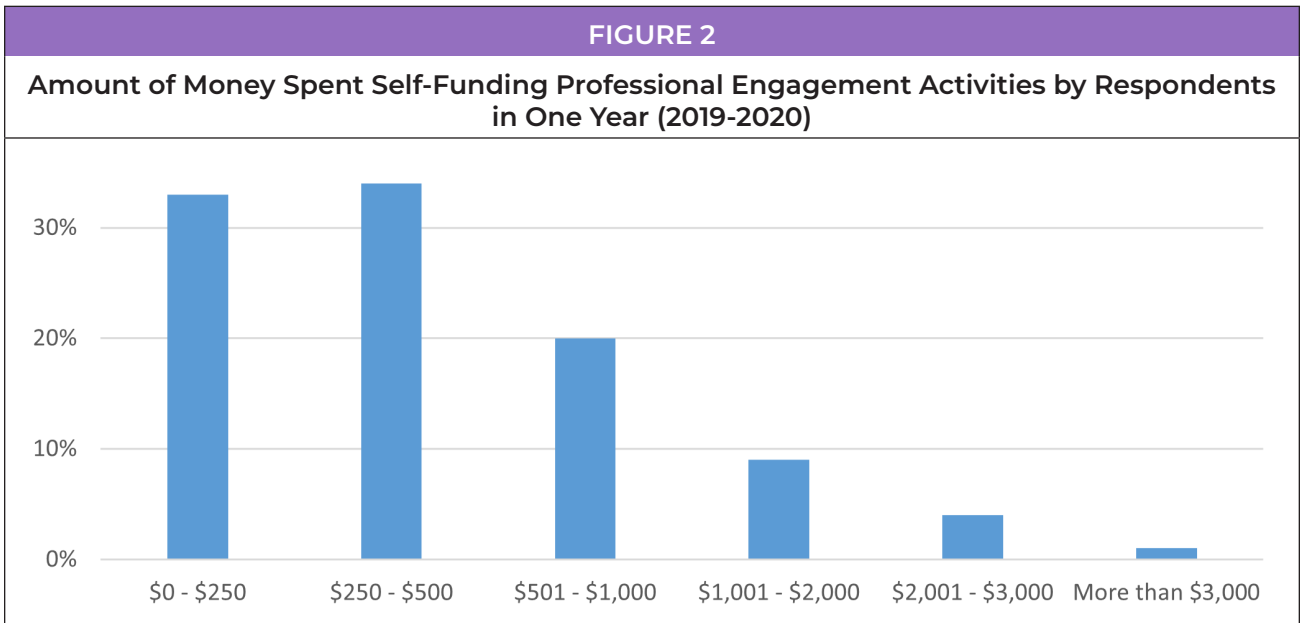
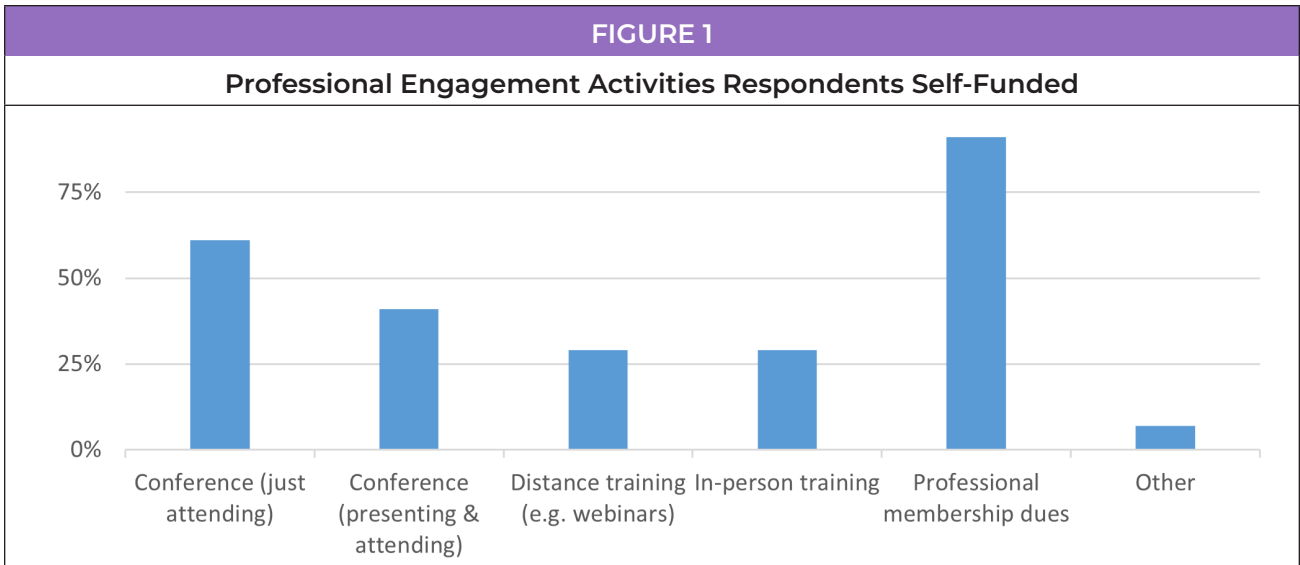
Promotion Requires Professional Engagement

Unsurprisingly, the majority of promotion structures for academic librarians require professional engagement. In our 2020 survey 88% (n=373) of respondents (n=423) stated that professional engagement activities were required for promotion. Similarly, in our 2023 survey 90% (n=351) of respondents (n=390) stated it was a formal requirement with an additional 7% (n=27) stating that it was an informal requirement. Thus, if librarians are seeking tenure, promotion, continuing appointment, or other types of career advancement they almost certainly must take part in professional engagement activities. For many librarians, advancement is required and must be achieved on a particular schedule or they will be given a terminal contract and forced out of their job.

Librarians Often Self-Fund

In our 2020 survey, we asked a number of questions about the types of barriers librarians face in accessing funds for professional engagement. 39% (n=209) stated they had issues accessing institutional funding. Our follow up question asked what kind of barriers they encountered. This was an open ended question which we coded through grounded theory analysis. 61% (n=122) of respondents (n=199) stated that limited funding kept them from engaging professionally, which was by far the highest. Other notable barriers included challenges with the application and approval process (27%, n=53), favoritism (12%, n=24), and burdensome reimbursement processes (11%, n=22).

In 2020 we also asked how much librarians spent on professional engagement activities and what sorts of activities they self-funded. 81% (n=437) of respondents (n=542) stated they have at some point funded their own professional engagement, with an additional 2% (n=10) stating they have funded all of their professional



engagement. As shown in Figure 1, when asked about what activities librarians have self-funded, 91% (n=406) of respondents (n=446) pay their professional membership fees out of pocket. 61% (n=273) self-funded conference attendance, 41% (n=182) self-funded conference attendance where they were presenters, with still others paying for webinars or virtual trainings (29%, n=130) and in-person trainings (29%, n=128). When asked how much people spent of their own money, the majority of people spent up to \$500 (67%, n=299) with a few spending over \$3,000 (1%, n=5). This is detailed in Figure 2.

Reimbursement Culture is an Active Barrier to Librarian Participation In Professional Engagement

Our 2023 survey asked respondents how professional engagement-related expenses were paid at their institutions. Most of our respondents were asked to participate in reimbursement culture in order to pay for these.

Here, reimbursement culture refers to academic institutions' normalization of reimbursement policies to off-set the costs of professional engagement from the institution, requiring people to pay costs upfront and wait to be reimbursed. 62% (n=309) of librarians' institutions pay for pre-event expenses (such as flights and lodging) prior to the event, and 68% (n=340) are reimbursed for event expenses (such as meals and ground transportation) after the event. 47% (n=238) pay for pre-event expenses on their own prior to the event and are reimbursed after the event takes place, while 17% (n=83) pay for these on their own but are reimbursed before the event takes place. Finally, 16% (n=79) are provided with money for expected event expenses prior to the event (such as the per diem in advance or an institutional travel card to put expenses on during the event). This data shows that reimbursement culture expects most librarians to front the costs of (required) professional engagement out of pocket.

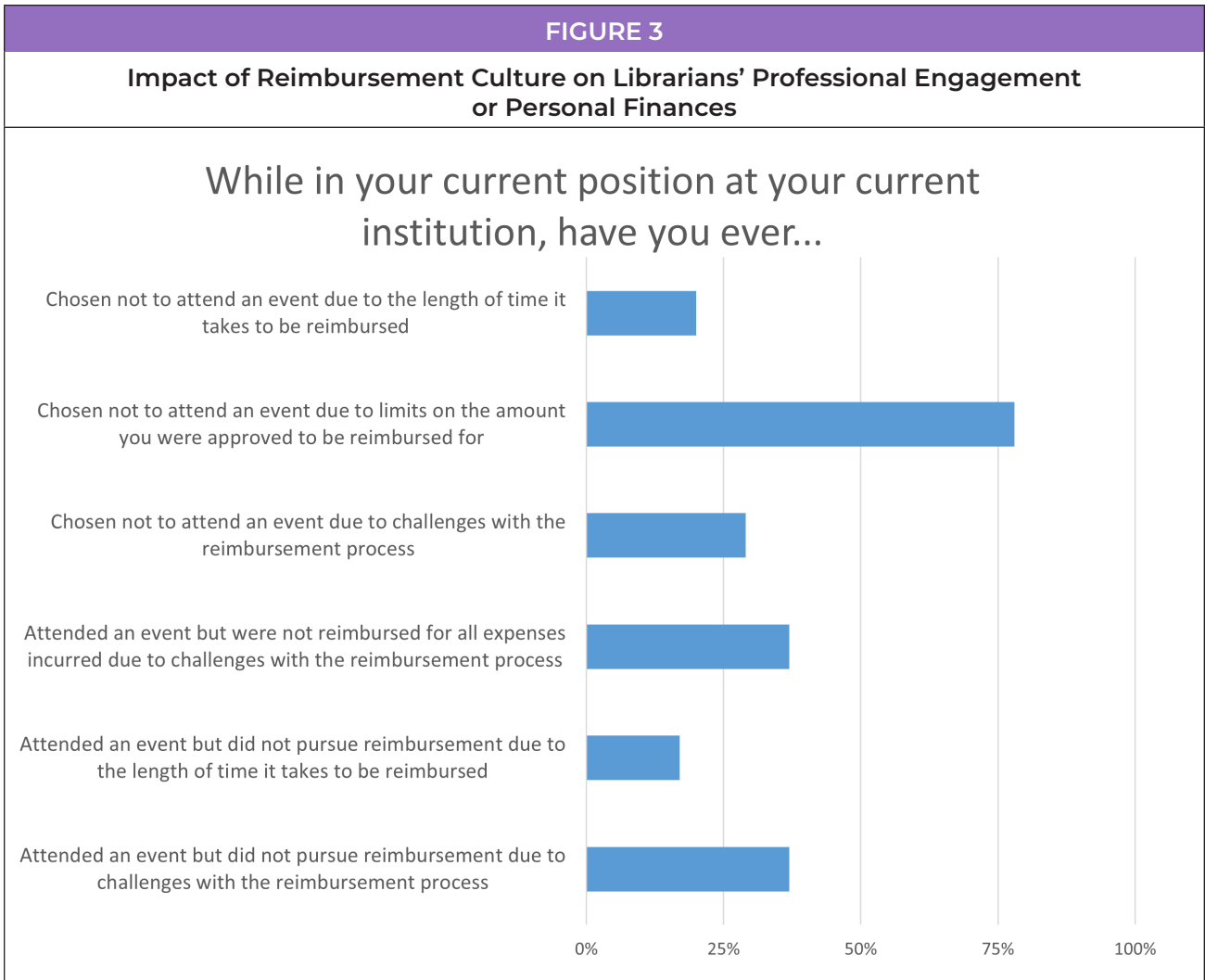
Concerning expense reimbursements, most respondents stated that their institution always provides reimbursement for conference registration (82%, n=401), hotels (73%, n=357), airfare (71%, n=347), mileage (56%, n=275), and per diem (56%, n=277), while 53% (n=260) never cover incidentals (such as a forgotten toothbrush) and 48% (n=238) never cover childcare. While the majority of respondents' institutions did cover per diem and mileage costs, a surprising number of respondents describe institutions that only sometimes covered or never covered these expenses. One respondent told us that "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."

This survey also included a question on whether reimbursement culture had affected respondents' level of participation in professional engagement activities (see Figure 3). The answer was a resounding yes. 78% (n=294) of respondents (n=375) did not attend a professional engagement event due to limits on the amount they were approved to be reimbursed for, 29% (n=107) did not attend a professional engagement event due to difficulties with the reimbursement process, and 20% (n=76) did not attend a professional engagement event due to the length of time it takes to be reimbursed at their institution. Additionally, 37% (n=140) attended a professional development event but had not yet been reimbursed due to difficulties with the reimbursement process, while 37% (n=138) had also chosen not to pursue reimbursement for an event they attended due to challenges with the reimbursement process. If a large majority of librarians are choosing to walk away from professional engagement activities because they are not reimbursed, yet most librarians report that professional engagement is a requirement of tenure and promotion, it follows that reimbursement culture is an active deterrent to librarians successfully moving through the promotion and tenure processes.

Effects on Participation

A consistent and recurring theme in both our 2020 and 2023 survey data was librarians' inability to participate in professional engagement due to financial barriers, whether these were a lack of institutional funding available or reimbursement culture itself. In one case, "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" (2023 survey).

Librarians were unable to participate in professional service due to the high cost of dues for professional organizations. One respondent told us, "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" (2023 survey). Another respondent bemoaned that "since my institution doesn't cover membership costs, I would have to pay my own dues... The tiers, the additional costs for interest groups, then paying



even more for access to professional development resources, the costs simply aren't worth the return" (2020 survey). Other respondents indicated that they have chosen not to join national professional organizations because "yearly dues are...a little more than my budget can handle right now" or that they did not "pursue higher level service within ACRL to avoid having to attend ALA... I can't save for retirement, pay off my student loans, and defray my medical expenses" (2020 survey). Another "avoids most ALA and ACRL committees because I can't afford to attend every year/every conference" (2020 survey).

Librarians also consistently reported a financial inability to attend conferences. In our 2020 survey, 84% (n=351) noted conference attendance as financially out of reach. This included all types of conferences, such as leadership institutes, local conferences, and national conferences. 4% (n=17) of our 2020 survey respondents were accepted to present at a conference but were unable to attend due to the costs involved, and a further 3% (n=13) chose not to propose anything due to lack of funds. Others received scholarships or awards to attend conferences but were still unable to go because of additional uncovered costs: "I was selected to attend as a scholarship recipient and because the hotel and flight were outside of my price range, I was unable to attend" (2020 survey). If an institution has no funding available for conference-related expenses or relies on lengthy reimbursement processes to pay for these, librarians (especially those living in high cost of living areas) report that this makes it extremely difficult to attend or present at conferences: "I simply cannot afford to spend thousands of dollars of my own money traveling to conferences such as ALA, ACRL, or even [the state association

conference]” (2020 survey). Another respondent mentioned 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” (2023 survey).

Implications

We submitted this proposal to ACRL, and all of us will be presenting this paper at the conference in April 2025. Each of us works at institutions that are at least partially funding our participation, and will be presenting to audience members who are likely similarly privileged. It will not be apparent in the conference proceedings or during the presentations which of our colleagues are missing from these conversations. This paper has attempted to provide data snapshots of the true impact of requiring librarians to pay to keep their jobs, which is so often invisible. As we argue elsewhere,⁸ requiring librarians to self-fund, or engage with reimbursement culture to fund, professional engagement needlessly penalizes less privileged members of the profession, such as: those who are not white or affluent, those who do not have access to lines of credit, those burdened by student loans, those with caregiving responsibilities, and those who do not live in close proximity to national transportation centers. An inability to participate in professional engagement does not merely deprive many in our profession of exposure to recent research or learning new skills; it affects librarians’ professional advancement, both at their home institutions and within the profession more broadly. One 2023 survey respondent succinctly summarizes this: “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.” A 2023 respondent echoes this, saying “Economically disadvantaged people have to do so much more work for the same experiences that some people can just shell out for.”

It is also demoralizing, as this 2023 respondent describes: “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.” In a forthcoming article, we use the concept of administrative burden, taken from public policy, to analyze funding and reimbursement processes for academic librarians. Originally applied to citizens’ interactions with government, we find it useful for framing the other costs of how academic libraries and higher education institutions structure funding and reimbursement for professional engagement. Although financial costs are significant and can be obvious, there are also learning costs, compliance costs, and as the above respondent notes, psychological costs.⁹ The ability to bear these costs is also unevenly distributed and reflects broader social inequities. A 2020 respondent explicitly connects each of these threads: “I find it really ironic and disheartening that a profession so supposedly devoted to equality enforces such financially restrictive and exclusionary practices. Attending expensive conferences all but insures [sic] greater recognition and faster advancement for those in more comfortable financial positions.” As this respondent notes, this profession can, and should, do better, given its stated values and code of ethics.¹⁰

Conclusion

In the 2020 survey, one respondent recounted that, “I do not have a credit card that can float thousands of dollars at a time while I wait to be reimbursed. I have been told to get a credit card or ask family for money to pay for professional development opportunities.” In the face of seemingly never ending austerity measures within higher education, academic libraries frequently ask individual librarians to bear the myriad costs of their own professional engagement, even as those academic libraries and higher education institutions benefit from the employees’ professional development. If tenure, promotion, and advancement in the profession are to be equitably accessible, institutions must take on the responsibility of investing in their employees, rather than

constantly relying on vocational awe. As a 2023 respondent points out, “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.” We understand that institutional contexts vary widely, but suggest that some answers are actually fairly straightforward. Rather than reimbursing expenses long after the event, libraries should either quickly reimburse upfront costs, even before the event, or simply just pay for them. They should consider covering dues for professional organizations, especially if service to the profession is required for promotion or tenure. Librarians need to speak openly about money and the other exclusionary practices that adhere to funding and reimbursement for professional engagement, and when they find themselves in positions of power and authority, advocate for more inclusive and equitable practices. Moreover, academic libraries should carefully examine their policies and procedures for funding and reimbursement with an eye to their administrative burden, and actively work to reduce it whenever possible. As these surveys have shown, individual librarians are well aware of the bind they are in, and are well aware that they have to pay to keep their jobs. The solutions, however, are largely beyond our reach as individuals; this problem is structural, and can only be resolved through structural change.

Notes

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