Professional Development Fund Policy
June 2018

**Purpose**
The Professional Development (PD) Fund’s purpose is to provide full-time staff the opportunity to pursue professional or individual development activities, and be reimbursed up to $750 per employee, per fiscal year. PD activity choices are to be individual employee driven, however departmental collaboration is encouraged. The PD application must be initiated by the employee. In the case that the employee chooses an activity that exceeds the $750 awarded by the PD Fund, the employee’s department has the option to cover the additional costs. In the case that the employee chooses not to use the PD Fund, departments are not permitted to apply for the PD Fund on their behalf and receive a department budget offset.

**Introduction**
A commitment to continuous learning and innovation will enhance MSU Denver’s ability to fulfill its mission. In support of that commitment, the University has developed a Professional Development Fund to ensure that the staff continue to grow as professionals.

The focus of an employee’s professional development activity should be guided by employee, department, and University goals and objectives. Conferences, seminars, academic coursework, and trainings are some of the ways our staff may pursue professional development.

In all cases, employees must receive approval from their supervisors before applying to use the PD Fund.

**Description**
Employees of the University may identify professional development opportunities outside of the normal workshops, seminars, and Tuition Scholarship offered by the University. These opportunities include academic coursework at other institutions of higher education which is not offered at MSU Denver, conferences, seminars, trainings, professional organization memberships, certification study materials, certification exams, among others as determined by Human Resources. Textbooks for undergraduate/graduate/doctorate coursework are not covered by the PD Fund. The monies in this fund are limited and dispersed on a first come, first serve basis. Employees may be reimbursed from the fund up to $750 each fiscal year for qualified professional development activities.

**Eligibility**
All full-time staff who have completed at least one year of service to the University are eligible to apply to use the PD Fund. Employees are required to obtain supervisor approval to qualify for this benefit. Faculty and chairs receive professional development funds through their individual departments and are ineligible for the PD Fund.

**Release Time**
Conferences, seminars, or work related trainings are generally offered during normal work hours. Hours spent in these activities are considered normal working hours. In the event that the activity takes place after hours, non-exempt employees are eligible for overtime, comp time, or flex scheduling. All employees (exempt and non-exempt) and supervisors should work together to make appropriate adjustments to determine overtime, comp time, or flex scheduling.

Employees using the fund for academic coursework at other institutions of higher education are expected to take courses at times other than normal work hours. In the event that the course is only offered during work hours, employees are granted release time for the course, as well as travel time to and from the class. Human Resources supports up to three (3) hours of release time per week per employee for developmental activities. If more than three (3) hours is needed, permission and scheduling changes are up to the discretion of the supervisor.
Authority
The Office of the President delegates authority to the Vice President of Administration and Finance to oversee compliance with this policy.

Questions regarding this policy, or requests for variances from the policy, should be directed to the Office of Learning & Development in Human Resources by emailing profdev@msudenver.edu.

Related Documents and Policies

Policy approved by:
Original: President’s Cabinet on December 8, 2008

Revision history:
Origination Date: December 8, 2008

Last Amended Data: June 21, 2018
Metropolitan State University of Denver
Professional Development Fund Procedures for Application

(Updated June 2018)

1. Eligible employees can receive a maximum PD award of $750.00 per fiscal year (July 1 to June 30), on a first come, first serve basis, pending available funding, and does not function retroactively. The $750.00 maximum can be attained in one single award or by applying for several smaller awards throughout the year that would collectively total the $750.00 maximum (if receipts substantiate such expense and funding is approved/available). The maximum award of $750.00 can be granted for any approved activity. All expenses must occur within the same fiscal year as the PD activity. July 1st of each fiscal year marks the first day employees may apply for that fiscal year’s PD Fund.

Please contact profdev@msudenver.edu if you do not attend your event, so we can ensure the expense is transferred back to the PD Fund, allowing other employees to afford professional development experiences. If you overspend from the PD fund (over $750) then your department will be charged for the excess.

2. Employee Eligibility:
   a.) Employed full-time at the University for a minimum of one (1) year at the time of the PD activity.
   b.) Current full-time employee status as a staff member (not serving as faculty or department chair).

3. Activity Eligibility:
   a.) Eligible activities:
      i. Academic coursework at other institutions of higher education (undergraduate coursework not offered at MSU Denver), conferences, seminars, work related trainings, professional organization memberships, certification study materials, and certification exam fees.
      ii. Graduate coursework (including MSU Denver) is eligible for this educational assistance benefit (up to $750 per eligible employee, per fiscal year). Additional funding may be available through your department. Tax Impact: Reimbursement for graduate academic coursework is tax exempt under the IRS Educational Assistance program up to $5,250 per calendar year. Expenses in excess of $5,250 will be reimbursed through Payroll as compensation and reportable on Form W-2.
      iii. Activities that do not fall into these categories will be assessed by Human Resources on a case by case basis.
   b.) Ineligible activities:
      i. Undergraduate coursework completed at MSU Denver is NOT eligible for Professional Development funds; the Employee Undergraduate Tuition Scholarship covers MSU Denver undergraduate coursework.
      ii. Undergraduate coursework that is taken elsewhere but is offered at MSU Denver.
      iii. Textbooks for undergraduate/graduate/doctorate coursework.
      iv. Student fees.

4. All PD applications must be submitted electronically. See instructions in the “How to Apply” section that follows. Submit one PD Fund application for each PD activity.

5. All expenses must occur within the same fiscal year as the PD activity and within the same fiscal year in which you are applying for funds.

6. There are two categories of professional development (PD) activities that are eligible for funding:
   a.) **Category A:** Employee Reimbursement - when the PD activity is paid for upfront by the employee only and the employee receives reimbursement.
   b.) **Category B:** Department Reimbursement - when the department agrees to cover any amount over the $750 granted by the PD Fund.

7. Human Resources’ Office of Learning and Development manages the PD Fund, however, each individual applicant is
responsible for adhering to these procedures to ensure reimbursement, a timely response to your requests, and maintain honesty.

8. There is a limited amount of PD funds allocated annually. Once these funds are fully exhausted within a fiscal year, applicants will be notified through an email communication that no additional PD funding can occur until the beginning of the next fiscal year.

9. Applications are processed upon receipt and are funded on a first-come, first-served basis, until all PD resources are allocated. A confirmation email message is sent to the applicant indicating approval and next steps.

10. In order to fairly distribute PD funds throughout the University, no more than four (4) employees from the same department will be awarded PD funds for attending the same PD activity. In this case, no more than four (4) PD applications should be submitted.

11. PD applications must be submitted a minimum of two (2) weeks before the PD activity. **NOTE: PD applications will NOT be approved if submitted after the event has taken place.**

12. All PD applications must be received by May 1 of each fiscal year, since all reimbursements must be fully processed by June 15 annually.

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**HOW TO APPLY:**

Determine whether you are applying for PD funding under category A or B below and then proceed accordingly.

**Category A**: If PD application is for an activity where an employee would pay upfront for costs and then be directly reimbursed, follow procedures for “Category A” below.

**Category B**: If PD application is for an activity where the department account would be directly reimbursed because the department agreed to pay the balance of a PD activity, follow procedures for “Category B” below.

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**Category A Procedure – Employee Reimbursement**

Any PD activity that the employee pays for up front and then gets personally reimbursed.

**Note**: It is the responsibility of the employee to make all arrangements for travel, hotel, registration, etc., to any seminar or conference. If registration must be expedited, please alert Accounts Payable at accountspayable@msudenver.edu.

**How to Access the Professional Development Fund Application**

1. Go to the Learning & Development Benefits webpage: https://msudenver.edu/hr/learning-development/ldbenefits/.
2. Click on “Professional Development Fund Application.”
3. Complete the application.
4. Send to supervisor to sign.
   a. Include all 4 components of the FOAP - a FOAP is needed for tracking purposes, and the employee would still get reimbursed. Add the activity code and location if your department uses them normally.
5. Attach the completed PD Fund application to an email with “[applicant name] PD Fund Application” in the subject line and send to Human Resources at profdev@msudenver.edu.
6. Human Resources will email the applicant and supervisor acknowledging receipt of the application and initial acceptance or denial of the request along with instructions for next steps. Note: It is highly advised to wait for approval before encumbering costs.

7. After the PD activity is completed, employee follows instructions to submit remaining documentation to Accounts Payable for final reimbursement - this reimbursement occurs after the employee has paid up-front for the PD activity. Send the following documentation to Accounts Payable at accountspayable@msudenver.edu:
   a. Copy of your award email stating you were approved for reimbursement.
   b. All receipts - if your receipt doesn't show a zero (0) balance, AP may request additional proof of funds expended.
   c. Check request form (https://msudenver.edu/media/content/officeofthecontroller/documents/ax2fpamtravel/PaymentRequest Form_03.14.18fillable.pdf)
      i. Put your department FOAP information on the payment request form for tracking purposes, but use the PD Fund #: 100010.
      ii. Payment requests are due within 30 days of the activity or by June 28th, whichever comes first.
   d. Travel Authorization (TA) form (if travel was involved).

8. After all documentation is submitted, Accounts Payable will process reimbursement from the check request form.

Category B Procedure – Departmental Reallocation (if the department agrees to cover expenses that exceed $750)

Follow these procedures if a Corporate Card is being used to purchase PD related activities. Please be aware that if you are using a Corporate Card, you must have your PD Fund approval prior to purchasing your PD activity and the cardholder is responsible for reallocating to the PD Fund. Cardholders will incur infractions for any requests to transfer expenses from a departmental FOAPAL into the PD Fund after the reallocation period has ended.

Note: It is the responsibility of the employee to make all arrangements for travel, hotel, registration, etc., to any seminar or conference. Please see the Corporate Card Handbook for more information.

Note: Under this procedure, all PD activity should be purchased using a corporate credit card.

How to Access the Professional Development Fund Application

1. Go to the Learning & Development Benefits webpage: https://msudenver.edu/hr/learning-development/ldbenefits/.
2. Click on “Professional Development Fund Application.”.
3. Complete the application.
4. It is the employee's responsibility to obtain supervisor permission for any activities that take place during normal working hours.
   a. Include all 4 components of the departmental FOAP. This FOAP must be the FOAP you will use for the conference/seminar expenses.
5. Attach the completed PD Fund application to an email with “[applicant name] PD Fund Application” in the subject line and send to Human Resources at profdev@msudenver.edu.
6. Human Resources will email the applicant and supervisor acknowledging receipt of the application and initial acceptance or denial of the request along with instructions for next steps. Note: It is highly advised to wait for approval before encumbering costs.
7. After receiving the approval email, the applicant follows instructions within the email to charge the amount they were awarded to the PD Fund:
   a. Pay for PD event expenses with a University corporate card (within the same fiscal year).
   b. Reallocate the expense to the PD Fund FUND#: 100010 while still using your department’s OAPAL (the OAPAL must be the same as the one you listed on your PD Fund application). Anything over $750 should be a split reallocation only allowing $750 against the PD Fund and the rest to your department’s FOAPAL. You can contact corporatecard@msudenver.edu for assistance reallocating.
   c. Attach a copy of your award letter (email) and your receipts to your Corporate Card statement.
   d. Contact HR at profdev@msudenver.edu if you need to report your event as canceled or you decide not to attend.

8. Note: when you reallocate this Corporate Card expense, use the appropriate account code and refer to the commonly used account codes document: https://msudenver.edu/media/content/officeofthecontroller/documents/ax2fpamptravel/000AccountCodesMostFrequentlyUsed05.03.18.pdf.

For Category B Out-of-State Events or In-State Over-Night Events

Prior to travel, the employee completes the “pre-travel estimates” of the Travel Authorization (TA) Form with appropriate signatures and submits to Accounts Payable. After travel, the employee completes the “actual expenses” segments with appropriate signatures and submits to Accounts Payable. The Travel Authorization (TA) form is located on the Accounting Services website.

How to Access the Travel Authorization (TA) form

1. Go to the Accounting Services website: https://msudenver.edu/controller/accountspayableaptravel/.
2. Click on “Travel”.
3. Click on “Travel Authorization”.
4. Do a “Save As” and save the TA form to your computer.
5. Fill in the appropriate blanks on the TA form.
   a. Type your department’s FOAP in the upper right corner.
   b. Type the words “Professional Development” in the upper left corner.
   c. Fill in the “estimate” section.
6. Print to PDF to create a virtual document and obtain electronic signatures.
7. Obtain your Supervisor’s signature (and Account Custodian’s, if other than the Supervisor) in the Pre-Travel Approvals box (lower left corner of the TA form).
8. Make a copy of this estimated form for your records.
9. Send the “pre-TA” to Accounts Payable at accountspayable@msudenver.edu.
10. Within 30 days of the conclusion of the seminar/conference, you must send the post-TA (using the copy of the original estimated TA) and all receipts to Accounts Payable at accountspayable@msudenver.edu. Include:
   a. Post-travel TA form completed with actual expense updates and signatures.
   b. Indicate the PD FUND# 100010 in the top right corner of your TA form and the amount approved for the PD Fund. The rest of your FOAPAL will match your department’s OAPAL.
c. All receipts - if your receipt doesn't show a zero (0) balance, AP may request additional proof of funds expended.

d. Professional development application.
e. Email stating the PD funds were approved.

11. **Note:** PD reimbursements/transfers will NOT be processed after 30 days from the end of the seminar/conference.

Questions? Contact the Office of Learning & Development at profdev@msudenver.edu or 303-605-5323.