

Procedure for the Distribution, Use, Management and Accounting of MSUAASF Professional Development Funds (PDF)

I. Preamble

This procedure is established pursuant to Article 15 Section A of the current Agreement between Minnesota State Colleges and Universities (MN State) and Minnesota State University Association of Administrative Service Faculty (MSUAASF). The use of professional development funds (PDF) will be in compliance with these procedures, the Agreement/Contract, and any applicable federal, state, MN State Board of Trustees, or university policies, procedures, guidelines, rules, regulations or laws. This procedure will be in effect until revisions or modifications are mutually agreed upon by both the campus association and the campus administration. After implementation of a new Agreement/Contract between MN State and MSUAASF, either the campus administration or the campus association may initiate a review of these procedures.

II. Management and Reporting of PDF

The Vice President for Finance and Administration or his/her designee is responsible for the allocation of the PDF and the retention of appropriate records.

III. Individual Member Accounting

Individual member PDF account balance information shall be maintained in the Office of Finance and Administration. Cost center balances can be reviewed by ASF members at any time via the eServices accounting module.

IV. Use of PDF

- A. PDF may be used for the purposes described in Article 15 Section A. Subd. 2 of the collective bargaining agreement.
- B. The MSUAASF member must receive approval to use PDF from the employee's supervisor. The employee and supervisor will discuss the request and determine if the use is consistent with Article 15 Section A. Subd. 2 of the contract. The supervisor will verify funds are available and in compliance with applicable regulations pertaining to the use of the funds. If a PDF request is submitted to the employee's supervisor and the request is denied and the employee believes the request merits approval, the request shall be reviewed by an appeals committee. The appeals committee will be comprised of two MSUAASF employees appointed by the association president and two University employees representing the University administration appointed by the University President. If, in the event the appeals committee is unable to reach consensus on the approval or disapproval of the appeal, the President of the University shall make

the final determination. The President's decision will be final. The approval or denial of a request to use PDF shall be communicated to the MSUAASF member in a timely manner.

- C. Employees shall not be required to take vacation or personal leave to pursue the activity unless the approval was for the express purpose to enroll in an academic class(es).
 - 1. Each MSUAASF member is responsible for completing and submitting the appropriate university travel reimbursement or purchase forms in accordance with Minnesota statutes and MN State policies and procedures along with supporting documentation, e.g. receipts, conference brochure, membership application or description of the publication or software, etc.
 - 2. Any items purchased with PDF, such books, journals, software, etc., are property of the University. When the employee leaves a MSUAASF position or terminates employment, the items purchased must be returned to the employee's supervisor.

V. Allocation and Distribution

- A. Under Article 15 Section A. Subd. 1, PDF are allocated to each campus based on full-time equivalent (FTE). A full-time twelve-month appointment equals one FTE.
- B. In order to distribute the campus allocation of PDF as provided by the MN State system office, the university will determine the number of FTE of MSUAASF members as of August 1 or a mutually agreed upon date each year as defined in paragraph D.
- C. Funds allocated to the university will be allocated to the individual employees within 30 days after St. Cloud State University receives the institutional allocation notification from MN State.
- D. PDF funds will be allocated to employees in the following manner: any individual employed $\frac{1}{2}$ time (.5 FTE) or less than $\frac{1}{2}$ time will receive .50 FTE allocation. An individual employed greater than $\frac{1}{2}$ time up to $\frac{3}{4}$ time (.75 FTE) shall receive an amount equal to $\frac{3}{4}$ of the FTE allocation. An individual employed greater than $\frac{3}{4}$ time shall receive an allocation equal to a full FTE allocation. After the funds have been allocated (which would include newly allocated and redistributed funds), a preliminary report shall be provided to the MSUAASF President for review. After agreement is reached, a final report will be issued to the MSUAASF President.
- E. A MSUAASF member may choose to transfer any portion of his/her PDF balance to another MSUAASF employee with review and approval by the employee's supervisor. A written transfer document signed by the

transferring and receiving MSUAASF members will be provided to the Vice President of Finance and Administration or his/her designee by the receiving employee.

- F. An employee moving from one MSUAASF position to another MSUAASF position within the university retains access to his/her existing PDF account without regard to any changes between full-time or less than full-time status.
- G. A MSUAASF member may accumulate up to \$5,000 in his/her PDF account. Any carry over beyond this amount requires a pre-approved written plan for the use of the funds. Any MSUAASF member proposing to carry over funds in excess of \$5,000 must submit a written plan indicating the MSUAASF member's supervisor approval by May 30. Copies of the approval of the employee's request shall be provided to the Associate Vice President for Administrative Affairs by June 15 by the employee. Any funds in excess of the \$5,000 not covered by an approved plan by the fiscal year end will be redistributed to all eligible MSUAASF members in the next distribution cycle. MSUAASF members with a balance of \$5,000 without an approved plan will not receive a new fiscal year allocation.
- H. If an individual leaves the University and does not designate a recipient or recipients of his/her unused funds, the funds will be equally distributed among MSUAASF employees at the next regular allocation cycle.

VI. Relationship to Sabbaticals, Retraining Leave, Paid Leave and Unpaid Leave

An MSUAASF member who has been granted a sabbatical, retraining leave or paid leave is eligible to use PDF as long as he/she maintains an association with the MSUAASF bargaining unit, and does not become affiliated with another bargaining or administrative unit. Funds cannot be utilized by an employee while on unpaid leave.

VII. Relationship to Other Funds

PDF may be used alone or in conjunction with other funds such as Professional Improvement Funds (PIF) under Article 15 Section B, or administrative travel funds under Article 14.

VIII. Separation or Retirement

A MSUAASF member who leaves the bargaining unit, separates from employment at the University, or retires forfeits access to unused PDF upon the effective date of the separation from the bargaining unit or the University. Any unused PDF funds will be equally distributed to all eligible MSUAASF employees during the next distribution cycle.

IX. Approval of Procedure

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Signature of University President or Designee

Date

John M. Lee

Signature of ASF Campus President

10 JAN 2020

Date

Date of implementation: