

ST. CLOUD STATE UNIVERSITY
Procedure for the Distribution, Use, Management and Accounting of
MSUAASF Professional Development Funds (PDF)

I. Preamble

This procedure is established pursuant to Article 15 § A of the current Agreement between MnSCU and MSUAASF. The use of professional development funds (PDF) will be in compliance with these procedures, the Agreement/Contract, and any applicable federal, state, MnSCU Board of Trustees, or university policies, procedures, guidelines, rules, regulations, or laws. This procedure will be in effect until modified. After implementation of a new Agreement/Contract between MnSCU and MSUAASF, either the campus administration or the campus association may initiate a review of these procedures.

II. Management and Reporting of PDF

The Associate Vice President for Administrative Affairs 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 Vice President for Administrative Affairs. Cost center balances can be reviewed at any time via online access to the Integrated Student Record System (ISRS) accounting module.

IV. Use of PDF

- A. PDF may be used for the purposes described in Article 15 § A, Subd. 2 of the collective bargaining agreement.
- B. The ASF member must receive approval to use PDF. The professional development opportunity shall be discussed with the employee's immediate supervisor. The employee and supervisor will discuss the request and determine if the use is consistent with Article 15 § A, Subd. 2 of the contract. The supervisor will verify that 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 immediate supervisor and the request is denied and the employee believes that the request merits approval, the request shall be reviewed by an appeals committee. This appeals committee will be comprised of two MSUAASF employees appointed by the association president and by 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 this request, 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 ASF Member in a timely manner.
- C. Approval by the employee's supervisor indicates his/her assessment that the proposed use of funds is for appropriate job related development activities. Before the request is submitted for

consideration, the employee must determine that sufficient funds are available to fund the proposal. In the event that the employee's account is overdrawn, no additional requests will be approved or additional funds allocated until the negative balance is resolved. It will be the employee's responsibility to resolve the negative balance. Employees shall not be required to take vacation or personal leave time to pursue the activity unless the approval was for the express purpose to enroll in an academic class(es).

1. Each ASF Member is responsible for completing and submitting the appropriate university travel reimbursement or purchase forms in accordance with Minnesota statutes and MnSCU 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 as 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 immediate supervisor.

V. Allocation and Distribution

- A. Under Article 15 § 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 Office of the Chancellor, the university will determine the number of FTE of ASF Members as of August 1 or mutually agreed upon date of each year as defined in paragraph D. below.
- C. Funds allocated to the university will be allocated to the individual employees when the University receives the official allocation notification from MnSCU. 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 MnSCU.
- D. For the purpose of determining the amount of PDF available to individual ASF members the university will allocate PDF to: 1) each ASF Member on the payroll as of the date of distribution on an FTE basis; 2) each nine to eleven month appointment, on the payroll on an FTE basis.

In the event an individual is filling a position for the year on a temporary basis, the individual on leave, the individual filling the position and the supervisor of the position will meet and decide how the PDF funds allocated for this position will be distributed.

- E. PDF funds will be allocated to employees in the following manner: any individual employed ½-time (.5 FTE) or less than ½-time will receive a .50 FTE allocation. An

individual employed greater than ½-time up to ¾-time (.75 FTE) shall receive an amount equal to ¾ of the FTE allocation. An individual employed greater than ¾-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 and the Treasurer for review. After agreement is reached, a final report will be issued to the MSUAASF President and Treasurer..

- F. Each ASF Member may accumulate up to \$3,000 in his/her PDF account. Any carry over beyond this amount requires a pre-approved written plan for the use of the funds. Any ASF Member proposing to carry over funds in excess of \$3,000 must submit a written plan for use of the funds to the employee's supervisor by April 30. A written plan to carry over funds must be submitted on an annual basis. The approval or denial of the written plan shall be communicated to the employee 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 \$3,000 not covered by an approved plan by fiscal year end will be redistributed to other eligible MSUAASF employees in the next distribution cycle. Employees with a balance of \$3,000 without an approved plan will not receive a new fiscal year allocation.
- G. An ASF 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 ASF Members will be provided to the Associate Vice President for Administrative Affairs or his/her designee by June 30th by the receiving employee.
- H. An employee moving from one ASF position to another ASF 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.
- I. 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 ASF Member who has been granted a sabbatical, retraining leave, or paid leave is eligible to use PDF as long as he or 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 § B, or administrative travel funds under Article 14.


VIII. Separation or Retirement

~~An ASF 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



Signature University President
or Designee 5.3.12
Date



Signature ASF Campus President 5/3/12
Date