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## INTEROFFICE MEMORANDUM

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TO: PROFESSIONAL STAFF UNION/MASSACHUSETTS TEACHERS  
ASSOCIATION BARGAINING UNIT MEMBERS

FROM: NICHOLAS N. MARSHALL, LABOR RELATIONS ADMINISTRATOR

SUBJECT: PROFESSIONAL DEVELOPMENT FUNDS APPLICATION  
INFORMATION

DATE: 12/10/2008

CC: ADMINISTRATIVE OFFICERS, J. JARRETT, K. RHINES, J. MARTONE

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The current PSU/MTA contract provides for a pool of money to be used for professional development to be distributed over the life of the contract to each Executive Area on the basis of the number of FTE unit members within that area. These funds will be awarded by the head of the Executive Area based on applications by bargaining unit members to support professional development activities.

**Who can apply?** All bargaining unit members who were employed on July 1, 2007, and who are still on payroll at the time application closing date and the time of the proposed expenditure will be eligible to apply for professional development funds from this pool.

**How much can you apply for?**

- Individual unit members will be reimbursed for no more than \$600 per individual for expenses permitted under the agreed guidelines. The first \$200 of each approved application will be funded in full and any remaining request for funding will be funded pro-rata, up to a maximum of \$600 in professional development funds during this year's application period.
- Members may also submit group applications. (For example: If you and other co-workers want to pool your professional development money to cover the expenses of having a workshop on or off campus, you may do so.)

*Note: If you have an additional request for funds after you have submitted an application, you may submit a second application form at a later date if remaining funds permit added awards.*

Maximum award amounts (up to \$600) will be dependent on the number of applications that are submitted and the total amount requested. The maximum amount may be prorated if requests submitted exceed the total amount available.

**What time period do these funds cover?**

Professional development funds may be applied to current expenses, future expenditures (as long as the funds will be allocated or encumbered before the end of the current fiscal year and spent by the end of the calendar year) and/or past expenditures that have occurred since July 1, 2007.

**What are appropriate uses for professional development funds?**

Professional Development funds may be used for any bona fide scholarly, educational, or professional purpose, including:

- Equipment: hardware, software, special tools, materials, etc.
- Tuition/training fee assistance: CE courses, off-campus courses, professional training programs, relevant adult education programs
- Conferences/professional meetings: registration fees, travel costs
- Subscriptions/memberships: professional journals, associations, etc.
- Educational materials: books, DVDs, videos, etc.
- Professional exam fees
- Travel to visit similar operations at other campuses
- Bringing consultants, speakers, trainers
- Stress management training
- Office furniture
- Research or project expenses and supplies

**Who makes the decisions about the awarding of professional development funds?**

Professional development funds will be awarded by the designee of the head of your Executive Area – usually the Vice Chancellor who oversees your area.

**What is the application process?**

An application form is attached to this email. Hard copies will also be mailed to you in the next few days.

To apply, you should fill out the application form listing your request for funds. There is a place for supervisor comment on the form. You will need to arrange release time for approved professional development activities with your supervisor. When you have completed the form, please ask your supervisor to briefly comment and return the form to you. *(Your supervisor's comments will be useful to the decision-makers in assessing your application.)*

**Submit the completed application form to the Administrative Officer for your Executive Area no later than January 9, 2009.**

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## **Administrative Officers**

### **Academic Affairs**

Donna Marino  
Provost's Office  
Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

### **Administration and Finance**

Ruth Yanka  
Vice Chancellor's Office, Administration and Finance  
Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

### **Advancement**

Kenzie Thompson  
University Advancement  
Memorial Hall  
University of Massachusetts  
Amherst, MA 01003-3625

### **Student Affairs**

Gail Matthews  
Office of the Vice Chancellor for Student Affairs  
Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

### **Chancellor's Area**

Mary Jane Quinn  
Office of the Chancellor  
Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

### **Research and Engagement**

Lisa Liebowitz  
Office of the Vice Chancellor for Research and Engagement  
Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

Also submit a copy of your completed application to the Union. You may send an electronic copy to the Union at [prostaff@external.umass.edu](mailto:prostaff@external.umass.edu) or mail a hardcopy to PSU Professional Development, 109 Hampshire House, University of Massachusetts Amherst, MA 01003-3625.

**When will you get a response to your application?**

Applicants will receive a written response to their application no later than 30 working days after the close of the application period.

**What do I need to submit to receive the funds that I am approved for?**

You should submit copies of appropriate receipts and/or documentation of proposed expenditures (e.g. conference registration issue, price specs on materials) with the application. Send receipts and other documentation acquired after you submit your application to:

Nicholas Marshall  
Human Resources  
336 Whitmore Administration Building  
University of Massachusetts  
Amherst, MA 01003-3625

All receipts and documentation must be received by June 1, 2009.

**What if I am denied funds?**

It is expected that expenditures which conform to relevant requirements of State and University policies, regulations, procedures and contractual agreement will be funded. Applications, for professional development funds, will not be unreasonably denied.

In the event that a bargaining unit member is denied professional development funding or receives less funding than s/he applied for, s/he may appeal the decision in writing, within 30 working days of the date of the applicant's letter, by giving notice to the Labor/Management Professional Development Committee. The Committee will review the case and make a recommendation to the appropriate Vice Chancellor or Executive Area head.

**PROFESSIONAL STAFF APPLICATION  
FOR PROFESSIONAL DEVELOPMENT FUNDS  
University of Massachusetts Amherst**

Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
Work Address: \_\_\_\_\_  
Appointment  Full time  Part time Hours worked per week if part time: \_\_\_\_\_  
Work Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Supervisor: \_\_\_\_\_

- This is an individual application  
 I am applying with others for a group project.

Please indicate others in group: \_\_\_\_\_  
\_\_\_\_\_

1. I am requesting professional development funds for the following purpose(s).  
\_\_\_\_\_  
\_\_\_\_\_

2. Amount requested: (If more than one expense, please specify amount for each. )

Use	Amount
1.	
2.	
3.	

**Total requested:** \_\_\_\_\_

3. This request is for:

- Past expense      Date: \_\_\_\_\_  
 Future expense      Expected date: \_\_\_\_\_

4. Please explain briefly how the requested items will support your professional development, help you do your job better or enhance or improve your work.  
\_\_\_\_\_  
\_\_\_\_\_

**5. Supervisor comment:** Please provide a brief comment on this employee's application for professional development money. Supervisors should initial any comments.

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Applicant signature: \_\_\_\_\_ Date: \_\_\_\_\_

**DEADLINE FOR SUBMISSION IS JANUARY 9, 2009**

Please submit original application to: Administrative Officers listed in cover memorandum

Please submit a copy of the application to: PSU Professional Development  
109 Hampshire House  
or via email to [psu@external.umass.edu](mailto:psu@external.umass.edu)

**ADMINISTRATIVE USE**

**Vice Chancellors/Designee**

Approved  Denied

Signature of Vice Chancellor or Designee: \_\_\_\_\_ Dated: \_\_\_\_\_

**Human Resources**

This application has been approved for \$ \_\_\_\_ .00.

Human Resources Representative: \_\_\_\_\_ Dated: \_\_\_\_\_