



Title: UMass President's Office – Expenditures from Centralized Professional Development Budget

Number: HR-INTERNAL

Effective: July 1, 2019

Responsible Office: Office of Human Resources

I. REASON

The University of Massachusetts President's Office ("President's Office") believes that providing professional development opportunities to staff members is an investment in their careers and the University's future. Toward that end, the President's Office has a central budget that certain departments may access to pay for some professional development related costs for staff members or that may be used to fund professional development programs that benefit all President's Office employees. For the purpose of this guideline, this budget will be referred to as the Professional Development Budget (PDB). The purpose of this guideline is to provide guidance to departments regarding what types of expenditures may be paid from the PDB.

II. SCOPE

This guideline applies to all President's Office departments that utilize the PDB. Some departments, such as UITS, UMass Online, the UMass Foundation and the Donahue Institute, have their own separate professional development budgets and these guidelines do not pertain to those Departments' expenditures from their own separate departmental professional development budgets.

This policy does not pertain to faculty and staff employee tuition discounts. For questions regarding that topic please read Administrative Standards – Faculty and Staff Tuition Discounts (Doc. T96-129).

III. APPROVAL AND COMPLIANCE

Department Heads are responsible for ensuring that any expenses that their department charges to the PDB are consistent with the purpose of the fund. The purpose of the PDB is to pay for professional development related costs for staff members. A department head should contact Human Resources if he/she has any questions regarding what qualifies as an appropriate expense. The Budget Office will not approve (or may reverse and assign back to the department) any charge that Human Resources determines is inconsistent with the purpose of the PDB.

IV. APPROPRIATE EXPENSES

- A. The following are examples of expenses that Departments may charge to the PDB, provided that the expenses are reasonably related to an employee's professional development within the profession or field in which he/she is currently employed within the President's Office:

1. Registration fees for professional conferences and training programs.
2. Out-of-state travel expenses related to attendance at professional conferences and training programs, including transportation, lodging, and meals.
3. Costs associated with webinars or other on-line programs, including programs that offer CPE credit for certifications.
4. Institutional membership dues and fees for professional associations and organizations that provide educational material, programs and other activities that advance the professional development of the staff member within his/her profession. A list of institutional memberships is maintained by Amy Thompson, the Facilities Manager for Collaborative Service Center in Shrewsbury.)
5. Personal membership dues and fees for professional associations and organizations that provide educational materials, programs, and other activities that advance the professional development of the staff member within his/her profession. Managers should use discretion concerning both the equal distribution of opportunities to participate in personal memberships and value of such memberships. For example, does the membership include access to a knowledgebase?
6. Costs associated with preparing for and/or taking an examination that will result in the staff member receiving a degree or certificate that will advance the staff member's professional development within his/her profession.

B. The following are examples of expenses that Departments may not charge to the PFD:

1. Salaries or additional compensation payments
2. In-state travel
3. Meals or other expenses for in-state programs that are not included in the registration fee. (An exception to this prohibition may be made if a national conference is taking place in Massachusetts.)
4. Business licenses/registrations that are required in order to perform the essential function of the staff member's current position (e.g. bar license and certified public auditor's license).
5. General subscriptions to newspapers, magazines or other journals unless they are specifically related to the staff member's membership in a professional association. Departments can pay for industry-specific journals out of their own funds and route them to all relevant department staff.
6. An employee's share of costs that are not covered by the Faculty and Staff Tuition Discounts (Doc. T96-129). For example, if an employee must pay 50% of the cost of a continuing education program, he/she cannot also be reimbursed for his/her share of this cost from the Professional Development Budget.
7. A degree program at another college or university.

V. COMPLIANCE WITH OTHER RELEVANT POLICIES

This guideline addressed the narrow question of when an otherwise appropriate cost can be charged to the PDB. The President's Office has other policies that provide more detailed guidance regarding travel, lodging and other expenses. Any expense that is billed to the PDB must also comply with these policies. Examples of other relevant policies include:

- UMass Central Administration Travel Policies and Procedures Manual
- UMass President's Office Business Expense Guidelines (U Doc T- 92-031 - Appendix C)
- Administrative Standards – Faculty and Staff Tuition Discounts (Doc. T96-129)

Any questions regarding these guidelines should be directed to the President's Office of Human Resources.