

BUSINESS SERVICES DIVISION PROCEDURES MANUAL	PROFESSIONAL DEVELOPMENT	REVISED DATE 09/07
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INTRODUCTION

Professional Development

Professional Development funds are available in the district to enable staff to improve their professional skills through workshops, classes, conferences, etc. and, (depending on the bargaining unit) purchase hardware/software to assist in the development of professional skills.

Personal Development

Personal development is defined as activities which do not directly relate to the employee's job description or are in support of professional advancement within the district. Personal development is recognized as an important individual need. The Professional Development office may provide personal development education as needs are identified. Further guidance may be found under District Policy No. 5520 - Staff Development and Regulation 5520.1 – Professional Development.

Funds

The amounts available per year for professional/personal development are as follows:

Union Group/Other	Designated BRC Authority	Inservice Allocation Per Year
Certificated Exempt Administrators	Director Professional & Organizational Development 571-1061	\$2250, may accrue up to \$4,500/yr.
Principals & Assistant Principals	Director Professional & Organizational Development 571-1061	\$2,250, may accrue up to \$4,500/yr.
Classified Exempt Administrators	Program Coordinator Classified Professional Development 571-1267	\$2,250, may accrue up to \$4,500/yr.
Exempt Executive Secretaries	Classified Professional Development 571-1267	\$2,250, may accrue up to \$4,500/yr.
Para Educators	Classified Professional Development 571-1267	Refer to negotiated agreement
Office Professionals	Classified Professional Development 571-1267	Refer to negotiated agreement
Professional Technical	Classified Professional Development 571-1267	Refer to negotiated agreement
Bus Drivers	Transportation Supervisor & Classified Professional Development 571-1267	Refer to negotiated agreement
Teachers	Certificated Professional Development 571-1056	Refer to your contract – Teachers receive optional days

Allowable Expenses

Allowable expenses are defined by negotiated agreements or contract and may include: professional dues, books, tuition and registrations for conferences and related allowable travel costs, workshops and pay for attending Professional Development and extra-curricular activities outside of regular work hours. Some bargaining units may purchase certain technology equipment. See specific language in the Professional Development section of your individual bargaining unit's contracts.

Paraeducators

- The Para contract addresses the specific maximum number of inservice hours that paras can use for building-based extracurricular activities (currently 6 per year)
- (See Contract Section 9.8 – Staff Development/Optional Hours, Pg. 9)

Bus Drivers

- Workshop registration, tuition and expenses related to Professional Development activities, and compensation for attending training outside of work time.
- (See Contract Section 15.6 pages 12-13)

Office Professionals and Professional Technical Employees

- (See Contract Section 17. Professional Growth, Pg. 21)

APPROVAL PROCESS

1. Classified employees must complete an [Individualized Professional Growth Plan](#) with administrative signature, (one per year.) and include a copy of the form when sending requests to Classified Professional Development.
2. Reimbursements & Vendor Payments: **Pre-approval** from the immediate supervisor and budget approval from the Professional Development BRC authority is required in order to be eligible for reimbursement from Professional Development funds. Complete and submit appropriate request form (see procedures below).
3. Technology Hardware/Software Purchase: **Pre-approval** from the immediate supervisor **and** Professional Development BRC authority is required for all hardware/software purchases. Purchases made prior to approval will not be reimbursed. Complete and submit the appropriate request form prior to purchase. (Not all contracts allow this purchase.) See **“Equipment Guidelines for Purchase of Hardware/Software”** below.

Note: Building/program/department discretionary budgets shall not be used to pay for employee-elected Professional Development expenses.

FORMS PROCESS

1. Use the “[Employee Reimbursement Claim & Vendor Payment](#)” form to request reimbursement and/or pre-payment to vendors **when no extended travel is involved**. Supervisor approval is required. BRC authority (usually Professional Development) must be contacted to verify sufficient inservice funds are available. Send completed forms to Professional Development for processing. See “procedures” below for additional information.
2. Use the “[Travel Authorization and Expense Claim](#)” (NCR form) when travel and travel-related expenses for workshops, conferences and other Professional Development activities are being requested. Send completed forms to Professional Development for review and processing. See “procedures” below for additional information.

Note: Fill out the estimated expense section prior to travel. Indicate if travel card is being used, if pre-registration is being requested or if you are requesting reimbursement.

3. Use the [Travel Expense Worksheet](#) to summarize your travel related expenses for reimbursement. Send with your claim form per instructions above.
4. Use the “[Private Auto Mileage Claim Form](#)” to request personal mileage reimbursement.
5. Use “[Authorization to purchase Hardware/Software Using Professional Development Funds](#)” form to request approved hardware/software purchases. (New form as of 9/2007). Links to forms can be found on the Professional Development webpage, the finance forms page, the HR forms page, and by clicking here.
6. Use the “[Utilization of Inservice Hours form for Additional Work](#)” form to request pay for additional work from Professional Development funds (not allowed in all contracts).

PROCEDURES

1. **Registrations, Travel, and Travel Related Expenses for Professional Development**

- Pre-approval from employee's immediate supervisor and the designated Professional Development BRC authority is required as stated in the "approval process" above.
- Attach documentation (i.e. copy of registration and/or conference materials) to pre-approved funding request and send to Professional Development for processing. If requesting pre-registration, please complete the entire registration section of the vendor registration form.
- For reimbursement, attach original proof of payment (i.e. receipts, invoice, etc.) to the "Claimant's" copy of pre-approved funding or travel request, along with the Travel Expense Worksheet if applicable. Remit these forms to Professional Development BRC authority for review and processing. Professional Development will forward to Accounts Payable for reimbursement.
- If approved, the district may pay registrations and overnight travel in excess of fifty miles (extended travel) directly to vendors if the request is received far enough in advance of activity and if vendor information is provided. (For extended travel, please refer to the Travel Procedures, section 1.7 of the Business Services Division Procedures Manual.)

2. **Equipment Guidelines (for Purchase of Hardware/Software)**

An [Authorization to Purchase Hardware/Software Using Professional Development Funds](#) form must be completed.

Purchases must be **pre-approved** by the immediate supervisor **and** the Professional Development BRC Authority in advance of purchase. Once approved, the employee may purchase the equipment and send the pre-approved form, together with the original proof of payment (i.e., receipt, invoice, etc.), to Professional Development for processing.

- **The only approved technology purchases for job-related professional growth is computer hardware and software.** Typical hardware and software purchases would include; a computer, printer, key board, mouse, monitor, external hard drive, memory, software, personal digital assistants, laptop and docking station.
- Other technology equipment, such as digital cameras, MP3 players, iPods, cell phones that are not part of a personal digital assistant, fax machines, and furniture are **NOT** acceptable purchases for Professional Development funds. Professional Development funds can not be used to purchase supplies or maintenance for technology equipment. Check with Professional Development before you make a purchase.
- Purchase of technology equipment to be used in a school, department, or program setting

should be purchased from building/department level funds, not Professional Development funds.

a. Equipment Criteria (for purchases under guidelines above)

- Equipment purchased using Professional Development money is subject to Federal Income Tax and is deemed property of the employee.
- All equipment purchases shall be on a reimbursement basis.
- Warranties purchased as part of a bundled package or separately shall be reimbursed **ONLY** if purchased with a computer on the original date of sale.
- District bids/contracts may not be used to obtain personal discounts.
- Employees shall be responsible for safeguarding all equipment including maintenance and repairs not covered by warranty, annual license renewal fees for virus protection and spam control (i.e. McAfee, Norton, etc.) and insurance.
- Equipment purchases will not be included in the district's inventory.

b. Discounts

Educator's discounts may be obtained directly from the vendor. **Prices and websites are subject to change.** Contact vendor directly for educator's discounts or visit vendor websites. References on the TPS website under Instructional Technology are for district owned and supported technology use and should not be considered approved items for purchase with Professional Development funds.

3. Utilization of Inservice Hours for Additional Work

Some agreements provide that staff development hours may be used for additional work with the pre-approval of the immediate supervisor. The employee shall complete the "[Utilization of Inservice Allocation for Additional Work](#)" form and send it to the Professional Development BRC Authority for processing. Payment for additional work will be processed through the payroll system. **Please note that hours worked must be pre-approved and reported in the month worked. Do not save up hours and report them periodically or at the end of the year.**

Use of vacation hours and Professional Development hours simultaneously is not allowed except for attending Professional Development related activities. Employees claiming professional hours for attending professional development while using vacation must complete the Utilization of Inservice Allocation Form.

4. Membership/Professional Dues/Registrations/Travel

- Membership/professional dues may be paid by the District directly to the vendors by using the approved purchasing cards maintained by a designated BRC authority. Such charges shall be reduced from the individual's balance. Complete the "[Employee Reimbursement Claim & Vendor Payment](#)" forms and check the payment directly to

vendor box.

- You must fill in the vendor information and provide documentation with the vendor name, address, phone number, fax, and any other payment related information if you are requesting Professional Development to pay the vendor directly.
- Each designed Professional Development BRC authority, as listed on page 1, has the responsibility of maintaining accurate records to prevent payment requests in excess of the per-employee maximum.

Cancellations and Refunds

Refunds for memberships, professional dues, books, registrations or extended travel which are paid directly to a vendor by Tacoma School District on behalf of an employee, utilizing Professional Development/in-service funds, are to be made payable to Tacoma School District, **not** to the employee. Refunds shall be credited to the employee's available Professional Development balance. Non-refundable cancellations shall be charged against the employees Professional Development funds.