

CBE Professional Development Funds

Employee Guidance

Guidance for Responsible Use of Professional Development Fund Allocations

Purpose

This guidance explains how CBE faculty and staff who receive an annual professional development allocation may use those funds. It also supports the supervisors, chairs, and directors responsible for reviewing proposed uses. The guidance promotes relevant learning and career development while ensuring the prudent use of University funds.

Professional Development Funds are Not Discretionary Funds.

The allocations are supported by General Operating Funds (GOF). Each expense must have a clear UW business purpose, relate to the employee's current responsibilities or reasonable advancement from the current position, and comply with UW and CBE requirements. Food, meals, and refreshments are not allowable.

Funding Rules

	FACULTY	STAFF
Funding Year	July 1 through June 30	July 1 through June 30
Carry-Forward	Unused funds may be carried forward for one additional fiscal year only.	Unused funds are not carried forward. They expire at the fiscal year-end.
Final Submission	Submit final expenses by the first week of June.	Submit final expenses by the first week of June.

Appropriate Uses

The following may be appropriate when the expense is relevant, reasonable, allowable on GOF, and approved as required:

- » Conferences, seminars, workshops, webinars, and professional training registration.
- » Courses, certificate programs, credentials, and certifications.
- » Professional memberships that provide a documented work-related benefit.
- » Conference related transportation and lodging that comply with UW travel requirements.
- » Books, manuals, and other learning resources with a clear work-related purpose.
- » Software subscriptions or specialized online tools that are not otherwise available through CBE or UW.
- » For faculty only, research assistant support that directly supports approved scholarship, research, or professional development activity.

Printed Materials and Books

Purchase printed materials thoughtfully. Consider whether an electronic or library copy is available, whether the material duplicates an existing resource, and whether its anticipated use justifies the cost. Materials purchased with UW funds are University property and must be retained or managed in accordance with UW and unit requirements.

Before Committing Funds

Employees benefiting from the funding are responsible for completing each of the following steps before committing their professional development funds:

1. **Confirm Relevance:** Explain how the expense supports current duties, improves effectiveness in the current position, or supports reasonable advancement from that position.
2. **Confirm Balance and Timing:** Verify the available allocation and whether the expense can be completed and processed within the applicable funding period.
3. **Request Approval:** Obtain approval from the appropriate supervisor, chair, director, or unit leader before registering, booking travel, purchasing, or arranging work.
4. **Confirm the Purchasing Process:** Consult CBE Finance and Administration when advance review may be needed. GOF allowability, UW purchasing rules, travel approval, software review, or employment requirements may affect how the expense is handled.

Expenses Requiring Additional Planning

- » **Travel:** Obtain required travel approval before booking. Conference related transportation and lodging may be allowable, but food, meals, and refreshments may not be charged to this professional development allocation.
- » **Software Subscriptions:** Allow time for review of licensing, security, accessibility, renewal, and procurement requirements. Do not start a subscription before approval.
- » **Courses and Memberships:** Confirm GOF allowability and approval before enrollment or purchase, particularly when the expense extends beyond the current fiscal year.
- » **Research Assistant Support for Faculty:** The scope, appointment type, funding, supervision, and timeframe must be reviewed and approved before work begins.

Year-End Submission

- ☐ Review balances and planned uses during spring quarter.
- ☐ Submit final receipts, reimbursement materials, and supporting documentation to CBE Finance and Administration by the first week of June.
- ☐ Requests received after the internal deadline are not guaranteed to be completed by June 30 and may not be charged to the intended fiscal year allocation.

Questions and Exceptions

Contact CBE Finance and Administration before making an unusual, high cost, or time sensitive commitment. The availability of an allocation does not make an expense allowable, and exceptions are not guaranteed.

Related Resources

- » UW and CBE travel approval and reimbursement guidance
- » UW purchasing, software, and reimbursement requirements
- » CBE Finance and Administration support: be-finance@uw.edu