

CBA Faculty Development Fund Request Form

Section 18.12.1 of the 2021-2023 CWU/UFC CBA makes available \$1,200 per fiscal year to each tenured and tenure-track faculty member. The amount shall be pro-rated for faculty working less than full-time. Funds are to be used for work related purchases and expenses, including travel. All expenditures must be in compliance with University policies. Assets purchased with these funds become the property of CWU and are required to be tagged and added to inventory in accordance with CWU's equipment capitalization guidelines. If purchasing assets, please review policies CWUP 2-40-210 State Property which explains appropriate de minimus use of state property (see policy links at the end of page). Fiscal year funds are available for use from 7/1/XX to 6/30/XX for each fiscal year covered under the contract. Expenses must be incurred in the same fiscal year in which the funds are being requested. Unused funds will not be transferred or carried over into another fiscal year.

Select a rationale code:

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|---|---|
| <input type="checkbox"/> 1. Travel for Academic Presentation or Performance | <input type="checkbox"/> 6. Equipment or Supplies to carry out lab research |
| <input type="checkbox"/> 2. Travel for Professional Learning (Workshops, seminar, etc.) | <input type="checkbox"/> 7. Equipment or Supplies to carry out field research |
| <input type="checkbox"/> 3. Electronic Device to enhance research development | <input type="checkbox"/> 8. Journal Subscription to enhance development |
| <input type="checkbox"/> 4. Electronic Device to enhance teaching development | <input type="checkbox"/> 9. Other: Please be explicit on how this purchase affects professional development. You may need to consult with your department's assigned financial manager. |
| <input type="checkbox"/> 5. Electronic Device to enhance Service Development | |

Describe what you would like to purchase: *(Please be specific. If traveling identify dates, destination and reason for traveling. If purchasing supplies and/or equipment, identify what you are purchasing.)*

Describe how this purchase will enhance your Professional Development:

Total amount to be expended for this purchase:

Faculty Member's Printed Name	Faculty Member's Signature
Rank/Title	Date
Department Name & Number	Department Secretary or Fiscal Name

E-mail completed forms to: Your department Secretary or Fiscal staff and copy CBA_Faculty_Development@cwu.edu
Department Secretaries or Fiscal staff, this form and expense backup must be retained for reconciliation and audit. This form must be completed prior to purchase.

Allowable expense questions can be directed to CBA_Faculty_Development@cwu.edu.

Faculty Development Funds Request Procedure

1. Fund will be placed into your department's designated CBA faculty development budget at the beginning of each fiscal year.
 - a. Your budget will always be "Your Department #" | F: 149 | P: 221
 - b. Funding is allocated at the beginning of the year in late September or early October.
 - c. The department will be provided with a list of names of faculty members who have been funded and at what amount for tracking and reconciliation.
 2. Requests for funding will be reviewed and processed by the department secretary and/or fiscal staff.
 - a. The form will be reviewed for completion, the request is related to faculty development in the field in which the faculty member is currently employed, the expense is allowable in accordance with the CBA, and University policy, and the asset is maintained in inventory if applicable.
 - b. Any questions regarding a request can be sent to the Finance Manger associated with your area or you can send an e-mail to CBA_Faculty_Development@cwu.edu.
 - c. Funding requests will be maintained in the department in the event of a review or audit.
 3. CBA Faculty development budgets will be reviewed periodically by Financial Planning and Analysis to confirm that funds are being spent in accordance with the CBA and University Policy.
 - a. These budgets will be reconciled by the applicable departments to ensure expenses are posting in a timely manner, are posting for the correct amounts, and are not exceeding the amount funded.
 4. At the end of each fiscal year any remaining funds will be returned to the Provost's budget, where the funds originated; they will not carry-forward into the next year. These funds are not a part of the department's base funding. Expenses for faculty development must be incurred during the fiscal year in which they're being requested/reimbursed and posted to a University budget prior to the end of the same fiscal year, June 30th.
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Most Common Allowable Expenses:

- Travel to conference for learning applicable to the faculty member's field of study.
- Travel to conference to present research related to the faculty member's field.
- Membership purchases to stay current in the faculty member's field of study.
- Subscriptions to stay current in the faculty member's field of study.
- Books related to the field of study of the faculty member for research.
- Equipment can be purchased using CBA faculty development funds when related to faculty development with prior Finance Manager approval.

Examples of Un-Allowable Expenses

- Repair/Upgrade of personal equipment being used for research
 - Because this is personal property this expense is not allowable.
- Purchase of software that is owned by the faculty member and/or not accessible by the University.
 - EX. Software purchased on a personal account that can't be accessed by the University for re-installation/etc.
- Expenses in which the Faculty member receives personal compensation for their research/work.
- Cell Phone Allowances
- Services Agreements/Contracts, such as Amazon Prime, internet service, other agreements.