

CBA Faculty Development Fund Request Form

Section 16.13.1 of the 2013-2017 CWU/UFC CBA makes available \$700 per fiscal year to each tenured and tenure-track faculty member. 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 should be tagged and added to inventory in compliance with CWU's equipment capitalization guidelines. If purchasing assets, please review policies CWUPP 2-40-210 State Property and CWUP 2-40-050 Ethics in Public Service 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. Unused funds will not be transferred or carried over into another fiscal year.

Select a rational code:

- | | |
|---|---|
| <input type="checkbox"/> 1. Travel for Academic Presentation or Performance | <input type="checkbox"/> 6. Equipment of 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:

Approved Travel Authorization/Travel Expense Voucher/Purchase Requisition Number:

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 person and copy CBA_Faculty_Development@cwu.edu
Department Secretaries or Fiscal People, this form and expense backup must be retained for reconciliation and audit.
Allowable expense questions can be directed to CBA_Faculty_Development@cwu.edu.

Faculty Development Funds Request Procedure

1. Fund will be placed into your designated CBA 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 at 90% of the available funding. Additional funds will be transferred as needed.
 - c. The department will be provided with a list of names concerning which Faculty members have been funded for tracking and reconciliation.
 - d. Only CBA development activity should be processed into this budget.
2. Requests for funding will still be processed, they will be reviewed by the departmental secretary or fiscal person.
 - a. The form will be review to ensure it is fully completed, the requested expense is related to faculty development in the field that the professor is currently employed, the expense is allowable according to the CBA and University policy, and the asset is maintained in inventory if applicable.
 - b. Any questions regarding the ability to purchase an item requested 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 should be maintained within 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 the funds are being spent appropriately in regards to CBA and University Policy.
 - a. These budgets should still be reconciled by the applicable departments to ensure that expenses are posting in a timely manner, the expenses are posting for the correct amounts, and they are not exceeding the amount funded.
 - b. Additional funding will be allocated once the funding initially transferred has been consumed. If an expense will post to the budget but it would exceed the amount available, please contact your financial manager to review and allocate the remaining CBA funds into your budget to cover the expense(s).
4. At the end of each fiscal year any remaining funds will be pulled back into the Provost’s office, 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.
 - a. Please ensure that all expenses for the fiscal year are posting in the budget by the end of June if they are to consume the current year faculty development funds. Faculty development funds will only be consumed if the expense posts in the correct fiscal year.

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 development funds 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/can be accessed by the faculty member.
 - EX. Software purchased on a personal account that can’t be accessed by the University for re-instillation/etc.
- Expenses in which the Faculty member receives personal compensation for their research/work.